THE FOOD MARKETING INDUSTRY

SPEAKS

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1991

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The Food Marketing Institute (FMI) is a nonprofit association conducting programs in research, education and public affairs on behalf of its 1,600 members — food retailers and wholesalers and their customers in the United States and around the world. FMI's domestic member companies operate approximately 19,000 retail food stores with a combined annual sales volume of $180 billion — more than half of all grocery sales in the United States. FMI's retail membership is composed of large multistore chains, small regional firms and independent supermarkets. Its international membership includes 230 members from 60 countries.

TABLE OF CONTENTS

1 **Executive Summary**

2 **The Economic Environment**

4 **Companywide Operations**

8 **Store-Level Operations**

10 **Prepared Foods**

12 **Distribution Center Operations**

14 **Energy Issues**

16 **Methodology**

Key Supermarket Facts, 1990

Median Total Annual Sales Growth	5.3%
Median Identical Store Sales Growth	3.7%
Median Weekly Sales per Store	$174,800
Median Sales per Square Foot of Selling Area	$9.00
Median Sales per Labor Hour	$105.00
Median Total Store Size	31,000 Sq.Ft.
Median New Store Size	38,000 Sq.Ft.
Median Number of Items	30,000

EXECUTIVE SUMMARY

As the first year of the new decade comes to a close, the food distribution industry faces a set of difficult challenges: a recession, a shortage of entry-level associates, rapidly changing consumers and a population that is barely growing in number. The changes these challenges bring are evident throughout our report.

Store development underwent two important shifts from the 1980s. First, companies are opening more stores than they close. In 1990, for the second consecutive year and the third in the last four, slightly more stores were opened than closed. The second key shift is the stabilizing of store size, following almost continuous increases in the 1980s. The median new store size in 1990 was 38,000 square feet, down slightly from 40,000 in 1989 and 40,800 in 1988. Just as important, the three main store formats—conventional, super store, and combination store—have settled in as well.

The industry is beginning to stabilize financially, following the merger and acquisition heyday of the 1980s. Profits were up slightly for the 1989-90 fiscal year according to FMI's *Annual Financial Review*, and other key financial ratios showed improvement. This stability will be tested as the 1991 recession unfolds.

The 1990 census showed that the U.S population increased about 0.9 percent per year in the 1980s. Even smaller increases are predicted for the 1990s. In another development, FMI's *Trends: Consumer Attitudes & the Supermarket* survey for the past two years has shown that supermarket customers are clearly price conscious and have changed their purchasing patterns as a result, although the impact has differed from region to region across the nation. These factors are reflected in 1990 sales growth figures. Typical company sales increased by 5.3 percent, which, when accounting for inflation, is actually a slight decline. Identical sales growth—those stores open during the entire two-year period—showed similar results. It is important to remember, however, that these numbers are in the middle of a very wide range. Some companies did well; others fared poorly.

Prepared foods in the supermarket are one way to attract shoppers in this slow-growth market. More than nine in 10 companies consider prepared foods as both a way to build customer traffic and generate profit. This year's *Speaks* study found that executives are striving to meet consumer demands for safety, quality, nutrition and convenience. When asked to rate a list of issues facing prepared foods operations, executives ranked product safety highest. Nearly a third said they are currently providing consumer literature on food safety to their customers. Almost 70 percent have changed their menus to respond to nutritional concerns and interests of their customers. The survey results show that a new kind of employee—someone with a background in restaurants and food service—is finding a home in the supermarket. In fact, one-quarter of the firms surveyed employ professional chefs.

In the productivity area, this year's *Speaks* analyzes detailed information collected at the individual store level, identifying trends in productivity ratios by store size, services offered and other variables. For example, our research found that the lowest payroll costs as a percentage of sales were reported in the smallest and largest stores, while those in the middle size-categories had higher payroll percentages. Stores measuring 35,000 to 45,000 square feet reported the highest space productivity.

Health related costs continue as a major concern in the industry. In the distribution center section of this year's *Speaks* study, executives ranked workers' compensation costs as their primary concern. Distribution executives also face the same problem as retailers: recruiting and retaining competent employees, ranked as the second most serious issue. This year's distribution center section also analyzes productivity results by various types of dry grocery centers.

A particularly critical environmental issue involves the use of chlorofluorocarbons (CFCs) in refrigeration equipment. CFCs are being phased out because of their harmful effect on the earth's ozone layer, as well as other environmental problems. The energy issues section of this year's *Speaks* features data on refrigeration use in the industry and some of the strategies companies are developing to deal with the CFC phaseout.

FMI compiles the majority of the data in this report from our annual study of the industry. Survey questionnaires were mailed to U.S. and Canadian retail and wholesale companies. FMI gratefully acknowledges all those who contributed by completing the questionnaires.

Industry information is also drawn from other FMI research, such as the *Operations Review*, *Facts About Store Development* and the *Annual Financial Review*. The Institute would like to acknowledge data gathered from the U.S. Departments of Agriculture and Commerce and from other government agencies and publications. A detailed explanation of the study's methodology appears in the appendix.

The report contains a complete analysis for 1990 but it does not include all the data from which it was developed. This information is provided in the companion report *Detailed Tabulations from the Food Marketing Industry Speaks, 1991*. Another study, *Trends: Consumer Attitudes & the Supermarket, 1991* explores shopping patterns and attitudes toward the many issues relating to supermarkets.

THE ECONOMIC ENVIRONMENT

GROSS NATIONAL PRODUCT IN REAL DOLLARS (BILLIONS), 1989 and 1990

1989	I	$4,095.7	1990	I	4,150.6
	II	4,112.2		II	4,155.1
	III	4,129.7		III	4,170.0
	IV	4,133.2		IV	4,147.6

SOURCE: U.S. Department of Commerce, Bureau of Economic Analysis

It is important to view *Speaks, 1991* in light of the general business climate occurring during the survey. The longest peacetime economic expansion in U.S. history ended as the economy entered a downturn in late 1990. For food distributors, a big concern was the increased cost of transporting products by truck. The CPI for motor fuels registered a 14.4 percent increase in 1990.

Following is a summary of general economic developments in 1990:

- In August, the Iraqi invasion of Kuwait sent oil prices skyrocketing. Between July and October, oil prices doubled before beginning to decline slightly at year's end.
- After growing sluggishly for the first part of 1990, the economy entered a recession in the latter part of the year. The jump in crude oil prices had the effect of reducing spending on other products, forcing business activity and consumer confidence to decline, and thus, further reducing consumer spending by year's end.
- Interest rates were declining by the end of the year in response to a softer economy, lower underlying inflation, the easing of monetary policy, and the new budget law.
- The budget deficit — as measured by the national income and product accounts — increased as a percent of GNP from 2.5 percent in fiscal 1989 to 2.9 percent in fiscal 1990. After adjusting for the cyclical weakness in the economy, the deficit declined slightly as a percent of GNP from fiscal 1989 to fiscal 1990.
- Stricter lending standards for commercial and residential loans slowed business investment and housing construction.
- The overall inflation rate, as measured by the fixed-weighted price index for all goods produced in the economy, rose temporarily in the first quarter of 1990 but was below the 1989 average in each of the last three quarters of the year.

Some sections of the country suffered more than others. The recession hit particularly hard in the Northeast. At the same time, the Mountain region was bolstered by employment gains in the service industries, particularly recreation and tourism. The contraction in the construction industry was felt nationwide as housing starts reached their lowest levels since 1982, affecting jobs in construction and real estate.

PRICES

In the beginning of 1990, consumer and producer prices were buffeted by the effects of the unusually cold weather in December of 1989. This substantially reduced available supplies of fresh fruit and vegetables and drove up the cost of petroleum based fuels. By the middle of the year, smaller food price increases and falling oil prices were reducing inflation.

Consumer and producer energy prices responded quickly to the August oil price shock. The surge of energy and energy related prices contributed to overall consumer prices, which rose at an annual rate of 6.4 percent during the second half of the year.

The overall CPI for all urban consumers changed 5.4 percent from 1989 to 1990. The CPI for food-at-home increased 6.5 percent. In various product categories, there were steep increases in perishables: 7.2 percent for meat, poultry, fish and eggs; 9.4 percent for dairy products; and 8.0 percent for fruits and vegetables. The category "other food-at-home products" registered a more moderate 3.6 percent increase.

CONSUMER EXPENDITURES

In real (1982) dollars, personal consumption expenditures increased approximately 2 percent in 1990 over 1989 according to the U.S. government. Expenditures for food fell approximately 1 percent. It is important to note that this food figure also includes alcohol, making it not entirely applicable to food retailing. The U.S. Department of Agriculture reports the percentage of disposable income spent on food has remained steady for the past three years: 7.4 percent spent in food-at-home and 4.5 percent spent on food away-from-home.

TRENDS IN DEMOGRAPHICS AND POPULATION GROWTH

The results of the 1990 census reveal a total population growth of 9.8 percent from 1980 to 1990. Annualized, that is less than 1 percent per year for the overall food marketplace. Some of the changes within the population were more important for food retailers seeking to refine their marketing strategies. For example, the Hispanic population grew 53.0 percent and the Asian, Pacific Islander group grew a phenomenal 107.8 percent, from 3.5 million in 1980 to 7.3 million in 1990.

EMPLOYMENT

As the economy entered its downturn, the unemployment rate began to climb. This was good news for supermarket operators in some parts of the country who found their recruiting problems beginning to disappear. However this is only a short-term fix.

The supermarket industry employs over 3 million people. The traditional market for supermarket employees—those aged 16-24—has been shrinking. The prime market for employees in the future will consist of new workers who are very different from the past. In the next 10 years, only 15 percent of the new labor force entrants will be native-born white males.

INDUSTRY FINANCIAL DEVELOPMENTS

Although the company restructurings of the 1980s still colored the industry's financial picture during the 1989-90 fiscal year, their influence was beginning to fade according to FMI's 1989-90 *Annual Financial Review*. After bottoming out at 0.71 percent of sales in 1988-89, the industry's net profit after taxes rebounded to 0.86 percent. One reason: the industry reported the highest operating income (2.45 percent of sales) since 1983-84. The increase in profitability is testimony to the industry's efficiency as it labored under the highest interest expenses ever reported: 1.33 percent of sales. Other key financial ratios also showed improvement in the 1989-90 fiscal year (FMI's *Annual Financial Review, 1989-90*) can be ordered from the form in the back of this publication.

MONTHLY UNEMPLOYMENT FIGURES FOR ALL CIVILIAN WORKERS, 1990

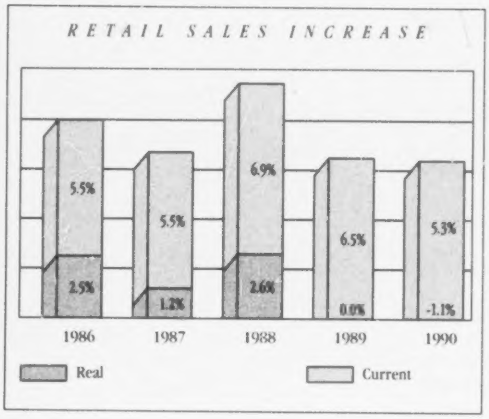
January	5.3%
February	5.3%
March	5.3%
April	5.4%
May	5.3%
June	5.3%
July	5.5%
August	5.6%
September	5.7%
October	5.7%
November	5.9%
December	6.1%

SOURCE: U.S. Department of Labor, Bureau of Labor Statistics

COMPANYWIDE OPERATIONS

> **"THE STORY OF STORE OPERATIONS DURING 1990 WAS ONE OF SLOW SALES GROWTH, IF THERE WAS GROWTH AT ALL."**

RETAIL SALES INCREASE



TOTAL SALES GROWTH

The typical company's sales grew 5.3 percent in current dollars in 1990. Accounting for inflation, this year's 5.3 percent sales growth translates into a 1.1 percent decline. This number is the midpoint of a very wide range. Some companies did very well in terms of sales growth, others not so well. In general, however, there were slightly fewer companies on the higher end (10 percent or higher) in 1990 than in 1989 and slightly more on the lower end (2.5 percent or lower). For example, 27.5 percent of the firms sampled reported sales growth greater than 10 percent, compared with 30.1 percent in 1989. On the other hand, 16.2 percent of the responding companies reported negative sales growth in 1990, compared with 14.2 percent in 1989.

Regionally, some areas hit harder by the economic downturn also saw a substantial number of companies with low sales growth. For example, sales declined in 23.8 percent of the firms in New England and 22.2 percent in the Middle Atlantic states. This compares with only 7.9 percent in the Southeast and none in the Pacific. New England and the East North Central regions present an interesting paradox. While more than one in five here reported declining sales, substantial numbers said they were doing very well. One-third of the New England firms and 22 percent of the East North Central firms reported sales growth over 10 percent or more.

IDENTICAL STORES SALES GROWTH

Sales growth for identical stores — those stores in operation in the entire period, 1989 and 1990 — provides a measurement free from the effects of newly constructed, acquired and closed stores during the period. The typical company in 1990 experienced a 3.7 percent growth in identical stores sales — a real dollar decrease of 2.6 percent. Once again, the range of companies reporting was wide. As with total sales, there were more firms on the lower end in 1990 than in 1989. Over 16 percent reported identical store sales increases of 10 percent or more, compared with 21.7 percent in 1989. Over 19 percent reported a decline in identical store sales, compared with 16.0 percent in 1989.

Percentage of Companies in the Following Total Annual Sales Growth Categories

	1989	1990
Less than 0%	14.2%	16.2%
0% to 2.5%	11.5%	14.9%
2.5% to 4.9%	14.2%	17.6%
5.0% to 7.4%	17.5%	12.6%
7.5% to 9.9%	12.6%	11.3%
10.0% to 12.4%	8.2%	7.2%
12.5% and above	21.9%	20.3%

Percentage of Companies in the Following Identical Store Sales Growth Categories

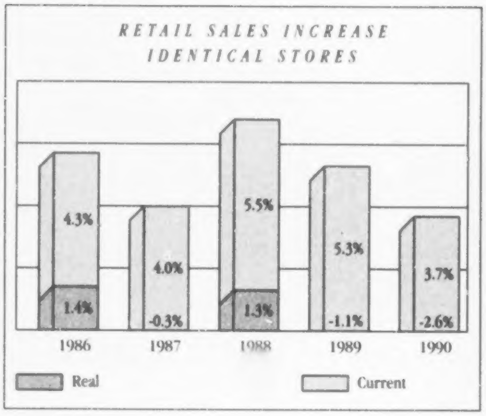
	1989	1990
Less than 0%	16.0%	19.1%
0% to 2.5%	13.7%	17.7%
2.5% to 4.9%	18.3%	23.9%
5.0% to 7.4%	20.6%	14.4%
7.5% to 9.9%	9.7%	8.6%
10.0% to 12.4%	7.4%	5.7%
12.5% and above	14.3%	10.5%

**Margin quotations are taken from "The State of the Industry—The Food Marketing Industry Speaks" presentation, Monday, May 6, 1991, at the FMI Supermarket Convention, Chicago, IL. Mark Hollis, President, Publix Super Markets, Inc. and Timothy M. Hammonds, Senior Vice President, Food Marketing Institute.*

Operating Results, 1986-1990

	1986	1987	1988	1989	1990
Gross Margin For Firms With a Distribution Center	23.6%	23.9%	23.9%	24.0%	24.3%
Gross Margin For Firms Without a Distribution Center	21.3%	22.6%	22.2%	23.4%	22.6%
Store Labor Expense as a Percentage of Annual Sales	8.8%	8.6%	8.7%	8.8%	8.9%
Store Fringe Expense as a Percentage of Annual Sales	2.2%	2.5%	2.3%	2.4%	2.5%

SOURCE: FMI Operations Review



OPERATING RESULTS

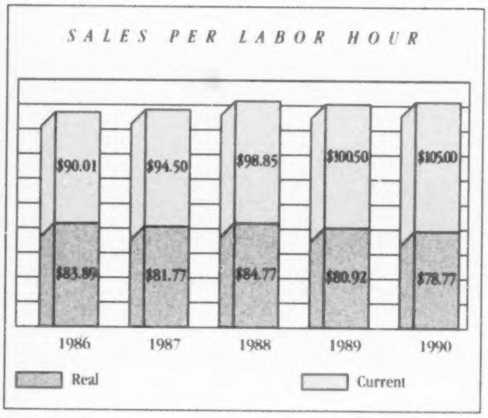
Gross profit margin is an important measure of the fraction of each food dollar that covers the costs and profits of the supermarket operator. The typical gross margin for companies operating their own distribution centers was 24.3 percent in 1990 according to FMI's *Operations Review*. This represents a slight increase from the figures reported for the past three years (see table). Although the gross profit margin for those companies not operating their own distribution center declined to 22.6 percent from 1989's 23.4 percent it is at about the same level as 1987 and 1988.

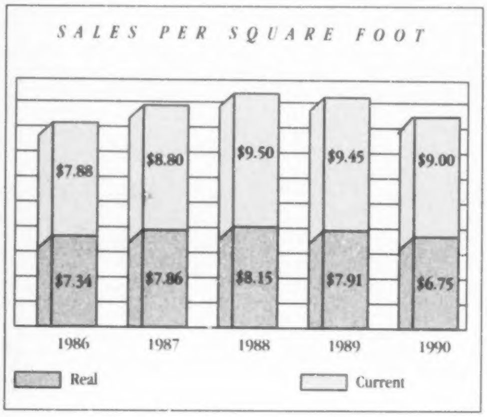
Weekly sales per square foot of selling area measures how well the store area is being used. The 1990 figure of $9.00 represents a slight decline from 1989's $9.45. This may reflect several things. Some shoppers are changing their buying habits in light of the tight economic conditions. FMI's *Trends: Consumer Attitudes & the Supermarket, 1991* report found that about one in five shoppers are using more economizing measures than they were a year ago. For example, 21 percent of shoppers surveyed are buying more store brands or other lower priced products instead of national brands. Another indicator is the fact that the typical average customer transaction size remained flat ($17.45 in 1990 vs. $17.60 in 1989). The median weekly sales per store in 1990 also dropped ($174,800 in 1990 vs. $193,500 in 1989).

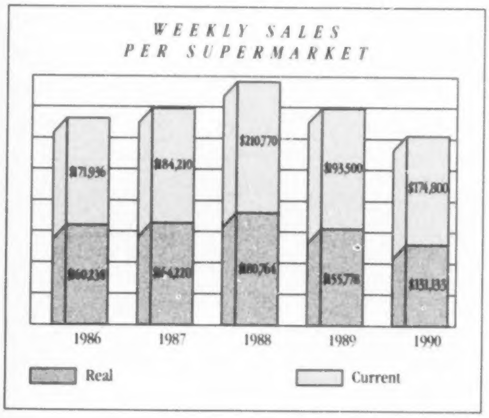
On the labor side, productivity improved. Median sales per labor hour were $105.00 in 1990 compared with $100.50 in 1989. Store-level labor costs represent the single largest store expense. The median figure increased from 8.8 percent of sales in 1989 to 8.95 percent in 1990, according to the *Operations Review*. Fringe benefits, the second largest expense, was 2.49 percent in 1990, compared with 2.40 percent in 1989.

The median number of items in a typical supermarket in 1990 remained at the level of the prior year—30,000*. This may be another indication of industry stabilization. It is important to remember that the number of items varies with factors such as store size and format. As shown in the table, combination stores carry the most items with superstores in second place for example.

**Beginning with the current 1991 report, the typical number of items carried will be calculated as the sample median consistent with our other sample statistics. In prior years, the sample mean was used. With a growing number of large supermarkets, the median provides a more accurate measure of "typical" stores than does the mean. The report shows the 1990 number recalculated as a median.*







STORE-DEVELOPMENT TRENDS

Two important shifts are visible in the store development area, according to FMI's *Facts About Store Development*. In 1990, for the second consecutive year and the third out of the last four, companies opened more stores than they closed, reversing the pattern of the early and mid-1980s.

A second shift is the stabilizing of store size after continuous increases throughout the 1980s. The median store size in 1990 was 38,000 square feet, a slight decline from 40,000 square feet in 1989 and 40,800 in 1988. More importantly, in 1990, median store size for the three major formats settled in as well at 25,000 square feet for conventionals, 43,000 square feet for superstores and 59,000 square feet for combination stores. These three formats have remained relatively stable in size over the past few years. Warehouse stores tend to vary in size more than the other formats, but they are generally larger (35,000+ square feet). The typical new warehouse store was 41,000 square feet in 1990. (*Facts* can be ordered from the form at the back of this publication.)

"COMPANIES ARE NOW OPENING MORE STORES THAN THEY CLOSE, REVERSING THE PATTERN OF THE LAST DECADE."

"THE SECOND DEPARTURE IS A STABILIZING OF NEW STORE SIZE." "JUST AS IMPORTANT, THE THREE MAIN STORE FORMATS HAVE SETTLED IN AS WELL."

OPERATING RESULTS BY STORE FORMAT

Speaks also collects operating data for stores by the main formats. As shown in the table, there are several important differences among the various store types.

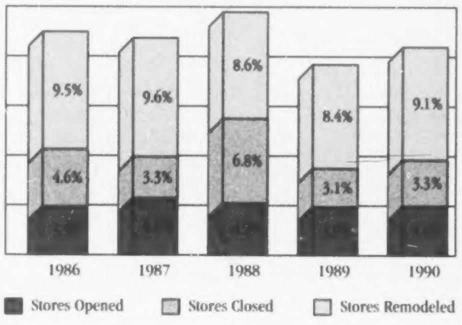
The median size of existing conventionals (23,175 square feet), superstores (39,850 square feet) and warehouse stores (43,300 square feet) in the 1990 *Speaks* sample is close to the typical new store size for these formats reported in *Facts*. This is another indication of industry stability.

From a historical perspective, several consistencies appear. Warehouse stores report the highest labor productivity, due to low customer service levels inherent in that format. They also report the highest average transaction size and highest weekly sales volume, perhaps an indication that more customers visit these stores to "stockup" than is the case in other formats.

Superstores reported the highest sales per square foot ($11.25 in 1990) and conventionals the lowest ($8.84 in 1990). Super stores in the past few years have reported about double the weekly volume of conventional stores ($290,000 for superstores vs. $138,000 for conventional stores in 1990).

As would be expected, combination stores carry the largest number of items, warehouse stores the smallest.

STORES OPENED, CLOSED, REMODELED



STORE FORMAT INFORMATION

	Conventional Stores	Super Stores	Combination Stores	Warehouse Stores
Median Weekly Sales	$138,000	$290,000	$275,000	$308,600
Median Number of Checkouts	7	10	10	12
Median Sale per Customer Transaction	$16.35	$18.59	$16.74	$25.77
Median Weekly Sales per Sq.Ft. of Selling Area	$8.84	$11.25	$9.67	$10.92
Median Sales per Labor Hour	$99.85	$108.32	$99.08	$138.75
Median Total Size in Sq.Ft.	23,175	39,850	43,900	43,300
Average Retail Price per Item	$1.45	$1.64	$1.72	$1.50
Median Number of Items Carried	17,000	26,000	53,000	10,000

For the first time, *Speaks* collected data on individual stores from each company, as well as company-wide results with the intent of analyzing the relationships among various factors. For example, when productivity results were delineated by store size, stores in the 35,001 to 45,000 square foot range were the most effective in sales per square foot of selling area. Another interesting point, the largest stores (over 45,000 square feet) reported the lowest payroll as a percentage of sales. On the other hand, the smallest stores (under 15,000 square feet) had the highest average transactions per labor hour.

The survey data included information on customer transactions, labor hours, store size, sales figures and services from a crossection of various types of stores.

The study calculated several productivity measures: traditional sales-based measures, (sales per labor hour and sales per square foot); transaction-based measures (average weekly transactions per square foot, average weekly transactions per labor hour and number of weekly transactions and average sale per customer transaction); and payroll ratios (weekly payroll as a percentage of sales and average payroll per labor hour).

RESULTS BY STORE SIZE

The sample was divided into five categories based on the total area of the store: under 15,000 square feet (12.5 percent of the sample), 15,000 to 25,000 square feet (35.5 percent), 25,001 to 35,000 square feet (21 percent), 35,001 to 45,000 square feet (14.6 percent) and over 45,000 square feet (14.3 percent). Our sample did not permit additional breakouts for the larger stores.

RESULTS BY TOTAL SIZE OF STORE

	Sales per Square Foot of Selling Area	Sales per Labor Hour	Average Customer Transaction
Under 15,000 sq.ft.	$ 8.65	$80.45	$12.32
15,000 to 25,000 sq.ft.	$ 8.41	$86.05	$14.63
25,001 to 35,000 sq.ft.	$10.54	$89.09	$17.37
35,001 to 45,000 sq.ft.	$11.40	$96.22	$19.84
Over 45,000 sq.ft.	$10.27	$99.54	$23.19

	Number of Weekly Transactions	Transactions per Square Foot of Selling Area	Transactions per Labor Hour
Under 15,000 sq.ft.	6,300	0.76	6.50
15,000 to 25,000 sq.ft.	8,427	0.53	5.90
25,001 to 35,000 sq.ft.	12,646	0.58	5.25
35,001 to 45,000 sq.ft.	15,288	0.53	4.80
Over 45,000 sq.ft.	20,000	0.44	4.50

	Average Weekly Payroll per Labor Hour*	Weekly Payroll as a Percentage of Sales*
Under 15,000 sq.ft.	$ 7.43	8.7%
15,000 to 25,000 sq.ft.	$ 7.90	9.4%
25,001 to 35,000 sq.ft.	$ 8.11	9.3%
35,000 to 45,000 sq.ft.	$ 8.68	9.4%
Over 45,000 sq.ft.	$ 7.64	8.0%

*All store employees, including managers, exclusive of fringe benefits

Some interesting productivity trends are apparent (see also the table on this page):

- The median weekly transactions per square foot of selling area was highest (0.76) for stores under 15,000 square feet and lowest (0.44) for the largest stores (over 45,000 square feet).
- The same pattern appeared in the typical number of transactions per labor hour.
- Stores 35,001 to 45,000 square feet were the most productive in sales per square foot of selling area ($11.40). Stores measuring 15,000 to 25,000 square feet were the least productive ($8.41).
- Labor productivity increased with store size beginning at $80.45 for stores under 15,000 square feet, rising to $99.54 for stores over 45,000 square feet.
- The largest stores reported the lowest weekly payroll as a percentage of sales (8.0 percent). The smallest reported 8.7 percent while the payroll averaged 9.4 percent for all the other sizes.
- The smallest and the largest were equally efficient in average payroll per labor hour (total payroll divided by total labor hours): $7.43 for stores under 15,000 square feet and $7.64 for those over 45,000 square feet. In contrast, payroll per hour averaged $8.68 for stores in the 35,001 to 45,000 square foot category.

As expected, the largest stores reported the highest average number of weekly customer transactions: 20,000 for the over 45,000 square foot group vs. 8,427 for stores measuring 15,000 to 25,000 square feet, for example.

The average sale per customer transaction also increased with store size. Stores under 15,000 square feet reported a median of $12.32, slightly more than half the $23.19 reported by stores over 45,000 square feet. Although the sample for this report requires grouping all the larger stores into one category, some distinctions among the larger stores appear in a companion report, *How Consumers Are Shopping the Supermarket, 1991*, published jointly by FMI and Coca-Cola USA. An order form is available at the back of this report. This study found that the average transaction size seems to peak after stores reach 60,000 square feet in selling area (approximately 80,000 square feet in total area).

STORE-LEVEL RESULTS BY SERVICE

	Sales per Square Foot of Selling Area	Sales per Labor Hour	Average Customer Transaction
Low service	$ 7.55	$85.74	$14.09
Middle service	$ 9.32	$87.75	$16.13
High service	$10.45	$93.06	$19.01

	Number of Weekly Transactions	Transactions per Square Foot of Selling Area	Transactions per Labor Hour
Low service	7,329	0.55	6.05
Middle service	10,250	0.53	5.45
High service	15,507	0.54	5.30

	Average Weekly Payroll per Labor Hour*	Weekly Payroll as a Percentage of Sales*
Low service	$ 7.50	9.0%
Middle service	$ 8.43	9.3%
High service	$ 8.00	9.1%

*All store employees, including managers, exclusive of fringe benefits

RESULTS BY AMOUNT OF SERVICE

Store service categories included: service meat, service seafood, pharmacy, service deli, prepared foods, service bakery, courtesy booth, lunch counter/snack bar, scratch and/or bake-off bakery, and carry-out clerks. Respondents were grouped into three categories: stores with three or fewer services were considered low service, those with four to six services were middle service and those with seven or more were high.

The fact high-service stores are likely to be larger may explain the parallels between the results grouped by size and the results grouped by service level.

High-service stores reported the highest average sale per customer transaction: $19.01, compared with $16.13 for middle-service ones and $14.09 for low-service stores. The high-service stores had more than double (15,507) the number of weekly transactions than low-service ones (7,329).

Looking at the results by service levels:

- Sales per labor hour increased with the number of services in this sample of stores. Low service stores reported sales of $85.74 per labor hour compared with the $93.06 for high-service ones. On the other hand, the average number of customer transactions per labor hour declined as the service level increased.
- Sales per square foot were also considerably higher in middle- and high-service stores, although the number of transactions per square foot remained fairly steady regardless of the service level.
- Service levels apparently made little difference in weekly payroll as a percentage of sales. Although middle- and high-service stores spent more per labor hour on payroll, the larger transactions may have kept the payroll percentage down. The stores in this sample appear to be able to offer high-service levels effectively and efficiently.

EXPRESS CHECKOUTS

Only about 15 percent of the respondents provided express checkout data, reporting a median customer transaction of $8.25. This compares with $16.76 reported for all respondents for the entire store. The average weekly sales per express checkout was $16,176, compared with $23,187 for the average register.

> **"FOR MORE THAN NINE IN TEN COMPANIES, PREPARED FOOD IS A GOOD WAY TO BOTH BUILD CUSTOMER TRAFFIC AND GENERATE PROFIT."**

OVERVIEW

Prepared foods has become a popular and important offering in many supermarkets. Over 90 percent of the responding companies believe that prepared foods play an important dual role: building customer traffic and generating profit. In fact, only 3.6 percent described the category as solely a profit center and only 4 percent said it was solely a traffic pull.

Speaks, 1991 examines many aspects of prepared foods including how management views prepared foods in terms of importance and overall contribution to the store, policy issues relating to prepared foods and predictions of the future for prepared foods. Data were received from 171 companies operating more than 12,000 total supermarkets. Approximately 60 percent of those supermarkets offered prepared foods.

PERCENTAGE OF COMPANIES INVOLVED IN THE FOLLOWING:

Offering hot foods to go	88.3%
Offering signature items	54.4%
Making their own sausages	55.0%
With own smoking operations	24.6%
Menu planning affected by customers nutritional concerns/interests	69.6%

METHODS USED TO DEVELOP NEW MENU ITEMS*

Chef/department head suggestions	54.6%
Management suggestions	43.7%
Employee suggestions	19.8%
Consumer research	15.1%
Customer suggestions	14.1%

*Multiple responses accepted

MENU DEVELOPMENT AND FOOD PREPARATION

In a move to recapture part of the business lost to restaurants, supermarkets are moving from food distribution into food preparation, developing ready-to-eat items within the company and, very often, in the individual stores.

- Of those firms offering "signature" items that is prepared food items exclusive to one store or one company 93.5 percent developed at least some of these in house.
- Eight in 10 produce "from scratch" deli items in which much of the preparation is done right at the store level.
- Less than one in 10 companies reported using central kitchens or a satellite ordering system by which foods are prepared in one store for use in multiple stores. Even among companies using standardized recipes, only 23 percent operate central kitchens or use a satellite ordering system.
- Over half the companies (55 percent) said they make their own sausages, 93 percent said they do so in-store.
- One in four have their own smoking operations of which, 75 percent are in-store.

TYPES OF CHANGES MADE IN MENU OFFERINGS (by percentage of companies)*

Less fat content	31.5%
Less cholesterol content	28.1%
Less salt/sodium items	33.7%
Low calorie/"lite" items	16.9%
More use of vegetable oil	11.2%
More poultry	9.0%

*Multiple responses accepted

Company-wide consistency is important. Over 60 percent of the respondents with two or more stores use standard recipes in all units.

Signature items tend to be used more frequently by larger companies. Seven in 10 companies operating 11 or more stores feature signature items, compared with less than half the smaller operators. In addition to developing signature items in house, 40 percent of those with "signature items" include some made by outside firms.

Menus are developed by various sources. Over 40 percent of the companies say new menu ideas come either from upper management or chefs. Nearly 20 percent also use employee suggestions, while about 15 percent said either customer suggestions or consumer research are important sources.

Many firms said new items are tested in selected stores before they become part of the regular menu. Companies also typically allow customers to sample new items. Special advertising, displays and promotions are also used to promote new items. A few companies perform a cost analysis of new items and estimate sales projections before adding them to the prepared foods section. However, a substantial number of companies said they have no formal policy for adding new items.

Almost 70 percent of the respondents say nutritional concerns have affected their menu planning. Asked for specifics, respondents said that most new items meet requests for products with less salt/sodium, fat, cholesterol and calories. Almost 10 percent feature more poultry and over 11 percent changed to low-fat oil.

These changes are not surprising. Consumers' top dietary concerns are fat, cholesterol and salt according to FMI's *Trends: Consumer Attitudes & the Supermarket, 1991.*

EXECUTIVES RATING OF STATEMENTS AS TO THEIR RELATIVE IMPORTANCE IN SUPERMARKET FOOD SERVICE DEPARTMENTS

How important is it to create and maintain an image of freshness in the foodservice department?	3.9
How important a part do food service departments play in creating an overall image for the store?	3.3
How important is packaging to the initial success of a new product?	3.0
How important are seasonal promotions to the success of the foodservice department?	2.9
How important is the location of the foodservice department within the store?	2.9
How important is it to have the prepared foods department as a part of the deli department?	2.8
How important is it to locate self-service areas adjacent to their service area counterpart?	2.6
How important are nutrition and ingredient labeling to the success of the food service department?	2.6
How important is cross merchandising with other departments?	2.4
How important is it to have the prepared foods department as a separate department?	1.7

4 = essential; 3 = very important; 2 = important; 1 = not important

PERSONNEL ISSUES

Finding the right people to manage and operate prepared foods sections is one of the many new challenges for supermarket operators—a task made tougher need for people with skills found more typically in restaurants.

Training is critical. When executives were asked to rate various training methods for prepared foods personnel, on-the-job training won decisively, averaging 3.6 out of four for importance. Restaurant/hotel training and culinary school training rated considerably lower at 1.8 and 1.7 respectively.

Even though restaurant/hotel and culinary school backgrounds were rated low, supermarket executives value these backgrounds for the people who manage their prepared foods operations. For example, 62 percent said they recruit employees from restaurants and other food service operations. Well over one-third currently employ or plan to employ food service professionals (those with formal education from culinary arts institutions and/or advanced skills in the food service area).

One-quarter of the 171 firms employ professional chefs. Those 43 firms employ a total of 389 chefs. However, less than 20 percent of the executives surveyed believe that a professional chef is necessary to successfully operate a prepared foods department.

Among the characteristics sought most in prepared foods/deli managers, three were mentioned most frequently (see table). They are:

(a) food-service/restaurant trained

(b) be a good business manager

(c) relate well to employees and customers

FOOD SAFETY AND PACKAGING

Another important challenge is to assure consumers that the prepared foods are safe and wholesome. About three-quarters of the shoppers studied in FMI's *Trends* report said that food safety is very important in their selection of products.

When asked to rate issues facing supermarket operators featuring prepared foods, ensuring food safety ranked first, scoring 5.6 out of 7. Almost a third of the companies currently provide consumer literature teach consumers safe handling and preparation practices.

Over three-quarters have a formal date rotation program specifically for prepared foods. When asked about what types of dating they use,

- Over 37 percent, best-if-sold-by dates
- Over 34 percent, code dating
- Almost 30 percent, pack dates
- About 32 percent, shelf dates on their products (the day the item was put on the shelf)
- Just under 12 percent, best-if-eaten-by dates.

Almost half the respondents use vacuum packaging for some prepared food items, principally meats and cheeses. As with food preparation, the majority indicated that they package items at the store level.

The final section of the survey asked executives to look to the future. When asked to rate the growth potential of various deli items and services over the next five years, pizza topped their list with a 3.2 rating out of four. Also highly rated were service meat and cheese and fried and barbecued chicken.

As shown in the accompanying table, executives felt it extremely important (3.9 out of 4) for the food service department to maintain an image of freshness.

RATING OF TRAINING METHODS FOR PREPARED FOODS PERSONNEL

On-the-job training	3.6
Job or product specific workshops, conferences, classes	2.8
Visiting competing companies	2.6
Formal sales/service training	2.4
Restaurant/hotel training	1.8
Culinary school training	1.7

NOTE: Ratings are 4 = essential, 3 = very important, 2 = important, 1 = not important

PREPARED FOODS PERSONNEL (percentage of companies:)

Employing or planning to employ food service professionals	36.8%
Recruiting employees from restaurants and other food service backgrounds	62.6%
Employing professional chefs	24.0%
Feel a professional chef is necessary to run a successful prepared foods department	19.3%

NECESSARY BACKGROUND TO SUCCESSFULLY RUN A DELI SPECIALIZING IN PREPARED FOODS (Percentage of companies indicating*:)

Food service/restaurant experience	30.1%
Good business manager	26.5%
Good human relations skills	23.9%
Attentive to cleanliness/sanitation	12.4%
Attentive to quality control	12.4%
Creative; willing to try new ideas	9.7%
Love of food	8.0%

*Multiple responses accepted

EXECUTIVE'S RANKINGS OF ISSUES FACING PREPARED FOODS

Ensuring the safety of prepared foods products	5.6
Ensuring the quality of prepared foods products	5.2
Obtaining and retaining qualified staff	4.8
Managing labor costs and achieving higher levels of productivity	4.1
Proper understanding of consumer's needs	4.0
Staying abreast of new developments	2.2
Competition from other outlets and fast-food restaurants	2.2

Rankings are 7 being the most serious and 1 the least serious

DISTRIBUTION CENTER OPERATIONS

"WHILE HUMAN RESOURCES CHALLENGES ARE CRITICAL TO RETAILERS, MANY OF THE PROBLEMS FACED IN DISTRIBUTION CENTERS ARE ALSO HUMAN RESOURCES ISSUES."

ISSUES

The cost of worker's compensation is the chief concern in distribution centers, ranking 5.6 in importance on a scale of 1 to 7. Most distribution center employees are covered by workers' compensation laws, which apply to injuries sustained on the job.

Another FMI report, *Customer & Employee Accident Experience in the Supermarket Industry* reveals the basis for this concerns. It shows that, while the number of initial claims has remained fairly constant over the past five years, overall costs have risen steadily as have health-care expenses. As a percentage of payroll, workers compensation costs have increased from 2.45 percent in 1985 to 3.2 percent in 1989, the latest year for which data are available. The average cost of an individual claim rose from $1,817 to $2,421 in the same period, a 33 percent jump.*

Speaks respondents said recruiting and retaining competent employees was the second most important issue facing distribution centers, rating 5 out of 7, followed by excessive injuries in the center. Surprisingly, aging of the workforce ranked lowest, 2.4 out of 7.

Clearly, the top three issues, workers compensation, recruitment and retention and worker injuries, are related. Recruiting people with the necessary physical stamina can be difficult but it will ensure that distribution center workers meet the physical demands of the job, particularly lifting, which account for a high number of injuries.

The grocery industry is seeking ways to reduce injuries. The *Voluntary Guidelines for Dry Grocery Shipping Containers*, published in January 1988, recommended a maximum shipping container weight of 50 pounds, adding that a 45-pound weight should be the goal to enhance worker safety.

Broken or damaged pallets are another source of worker injuries. A joint industry committee is currently evaluating alternatives to the current pallet exchange system. As a result of their work, a one-way recyclable shipping platform is on the horizon as a means to save trees, reduce product damage and curtail worker injuries.

DISTRIBUTION CENTER PRODUCTIVITY

Our distribution center study focused on five productivity measures:

- Average number of cases** selected and shipped per week
- Average number of pallets replenished per labor hour
- Average number of orders processed per week
- Average tonnage throughput per labor hour
- Average annual inventory turns.

Productivity is affected by the scope of the center's operations. To make valid comparisons, one must consider the size of the center in terms of number of stores served, average size of stores served, center volume at cost, etc., as described below.

NUMBER AND SIZE OF STORES SERVED

Two of the key variables affecting warehouse productivity are the number of supermarkets served by the center and the size of those stores. Centers serving supermarkets averaging under 20,000 square feet reported selecting and shipping considerably fewer cases per week (102,368 cases) than those serving larger supermarkets (327,560 cases for centers serving stores 20,000-34,999 square feet and 350,765 cases for those centers serving stores 35,000 square feet and over). This held true regardless of the number of supermarkets served or the dollar volume of the center, primarily because smaller stores carry fewer items overall, as well as a smaller stock of each item.

As would be expected, centers serving fewer stores, regardless of the size of those stores, selected and shipped fewer cases.

**Workers' compensation was a smaller financial burden for stores according to the* Customer & Employee Accident *study. The value of claims as a percentage of payroll for stores tracked those of distribution centers from 1985 to 1987, then leveled off. The average cost of an individual claim in stores increased from $1,260 in 1985 to $1,589 in 1989.*

***Full cases, no repacks*

per week. For example, those centers serving fewer than 50 stores selected a median of 77,500 cases per week while those serving 150 or more selected 507,500.

A related measure, the average number of orders processed per week, also increases with the number of stores served. Centers serving fewer than 50 stores typically shipped 225 orders per week, compared with those serving 150 or more stores which shipped 1,000 orders. There seems to be no relationship between the number of orders processed and the average size of the store served.

The number of pallets replenished or let-downs per labor hour (when palletized product is removed from the reserve storage area to the order filling slot), declines slightly as the number of stores served increases. This occurs as a function of the physical size of the building. Centers serving more stores are generally larger. Workers must travel greater distances within large centers to move pallets from place to place. Centers serving 50 stores or fewer reported a median of 20 let-downs per labor hour, compared with 18 for centers serving 150 or more.

Total tonnage throughput (the amount of product moved through the center per labor hour) also declined slightly with the size of the center because, in addition to the labor directly involved in moving the product, the measure includes overhead labor or indirect labor, i.e., custodians, supervisors and clerical personnel. The larger the center, the more indirect labor is included in the tonnage-throughput number. Centers serving fewer than 50 stores reported a median of 2,660 pounds moved through the center per labor hour, compared with 1,830 for centers serving 101 to 149 stores. Throughput also declined as the average store size increased (2,550 pounds for centers serving stores under 20,000 square feet compared with 1,692 pounds for centers serving stores 35,000 square feet and over).

Center size affected inventory turns. Smaller centers typically turned their inventory fewer times than larger centers: centers serving 50 or fewer stores 12 times per year compared with 17 times for those serving 150 or more stores. The number of items or stockkeeping units (SKUs) in the centers in this sample also increased with the number of stores served.

ISSUES IN DISTRIBUTION — AVERAGE RANKINGS*

Workers' compensation costs	5.6
Recruiting and retaining competent employees	5.0
Excessive injuries in the center	4.3
Government regulations	3.9
Labor problems	3.7
Substance abuse	3.2
Aging of the workforce	2.4

*Ranked from 7 = most serious to 1 = least serious

PRODUCTIVITY RESULTS FOR CENTERS SERVING SUPERMARKETS AVERAGING UNDER 20,000 SQUARE FEET

Median Number of Cases Selected and Shipped per Week	102,368 cases
Median Number of Pallets Replenished per Labor Hour (Let-Downs)	17 pallets
Median Number of Orders Processed per Week	440 orders
Median Annual Inventory Turns	12 times
Median Total Tonnage Throughput per Labor Hour	2,550 pounds

PRODUCTIVITY RESULTS FOR CENTERS SERVING SUPERMARKETS AVERAGING 20,000 TO 34,999 SQUARE FEET

Median Number of Cases Selected and Shipped per Week	327,560 cases
Median Number of Pallets Replenished per Labor Hour (Let-Downs)	18 pallets
Median Number of Orders Processed per Week	525 orders
Median Annual Inventory Turns	16 times
Median Total Tonnage Throughput per Labor Hour	2,056 pounds

PRODUCTIVITY RESULTS FOR CENTERS SERVING SUPERMARKETS AVERAGING 35,000 SQUARE FEET AND OVER

Median Number of Cases Selected and Shipped per Week	350,765 cases
Median Number of Pallets Replenished per Labor Hour (Let Downs)	18 pallets
Median Number of Orders Processed per Week	383 orders
Median Annual Inventory Turns	16 times
Median Total Tonnage Throughput per Labor Hour	1,692 pounds

Energy Issues

> **"A CRITICAL ISSUE THAT MUST BE FACED—AND NOT JUST FOR NEW STORES—IS THE USE OF CHLOROFLUOROCARBONS IN REFRIGERATION EQUIPMENT."**

OVERVIEW

Energy, particularly for refrigeration, is one of the most critical areas challenging supermarket operators today. The challenges are both economic and technological and will grow more daunting in the years ahead as the industry adapts to environmental imperatives—notably the need to alleviate ozone depletion and global warming by phasing out chlorofluorocarbons (CFCs) which are found in most supermarket refrigeration equipment today. As the phase-out moves forward, accompanied by high taxes on some CFCs, supermarkets will incur higher energy costs and capital expenses to replace existing equipment. *Speaks* also examines the types of refrigeration now in use and the strategies that supermarket companies are adopting to phaseout CFCs.

CFCS IN THE FOOD DISTRIBUTION INDUSTRY

The CFC agents in use today by most supermarkets are R-12, R-22 and R-502. R-12, a fully halogenated CFC, is the most harmful to the environment. R-22, an HCFC, is less harmful. R-502 is a blend of 51.2 percent R-115, a CFC, and 48.2 percent R-22. Due to the ozone depletion potential of R-12 and R-502, the Montreal Protocol and Title VI of the 1990 Clean Air Act have frozen current production at 1986 levels. Then a total phaseout is scheduled for the year 2000. A monetary incentive in the form of taxes has been added to deter their use: in 1990, CFC-12 had a base tax of $1.37 per pound, which caused the price to double; the tax will gradually step up to $4.90 per pound.

Since the ozone depletion potential of R-22 is low, it is not scheduled for a complete phaseout until 2030. Thus, it is a stopgap solution at best.

Companies were asked to state the type and cost of the refrigerant used for various applications: in new stores; for maintenance of equipment in all stores; in typical store air conditioning systems; in frozen and perishable distribution centers; and, in trucking refrigeration systems.

Large installations—frozen and refrigerated food warehouses, meat processing plants, dairies and frozen food plants—can use ammonia in their refrigeration systems rather than some form of CFC. Almost 60 percent of the respondents with frozen distribution centers use ammonia as a refrigerant as do about 38 percent of those responding for perishable centers. R-22 refrigerants are also used by almost 30 percent of the respondents' perishable centers and 20 percent of their frozen centers. As shown in the table, there is still substantial use of CFCs (R-12 and R-502) in perishable and frozen centers.

Smaller units—supermarkets, over-the-road trailers, railcars, food service installations and household refrigerator/freezers—rely almost exclusively on CFC or HCFC refrigerants.

Just under 62 percent said they were moving to R-22 for their new stores. Another 33 percent are using the blend, R-502, while only 4 percent use R-12. Eight in 10 companies reported using HCFC R-22 in typical air conditioning systems with the remainder divided between R-502 and R-12.

Since R-22 is a temporary solution, the greatest concern among respondents was the future. With what will HCFCs be

REFRIGERANTS USED IN FOOD DISTRIBUTION
(by percentage of companies)

Type of Installation	Type of Refrigerant R-12	R-22	R-502	R-717	NH3
Typical New Store	3.6%	61.8%	32.7%	0.00%	0.00%
Maintenance/Existing Stores	36.1%	28.9%	34.9%	00.0%	00.0%
Typical Store AC System	11.4%	80.0%	8.6%	00.0%	00.0%
Frozen Distribution Center	00.0%	20.0%	20.0%	45.0%	15.0%
Perishable Distribution Center	25.0%	29.2%	8.3%	25.0%	12.5%
Trucking Refrigeration	71.4%	7.14%	21.4%	0.00%	0.00%

replaced? Some operators were worried that R-22 will be banned before the year 2030 without adequate replacements available. The number two concern was the cost to convert existing R-12 units to R-22.

For maintaining refrigeration systems in existing stores, CFC use was much higher. For example, 36 percent reported using R-12 and 35 percent used R-502. The remainder used the HCFC R-22. The highest use of CFCs was reported in truck fleets. Almost 72 percent of the reporting companies used R-12 and almost 22 percent used R-502 in their trucks. Only 7 percent used R-22.

Refrigerant costs were also examined. Respondents paid an average of $4.11 per pound for R12 in 1990. R502 was even more expensive, averaging $5.05 per pound. On the other hand, R22 averaged $2.78 per pound. The high prices for R-12 and R-502 reflect the heavy tax burden.

RECYCLING

Refrigerant recycling and proper system maintenance can help minimize the harmful impact of CFCs on the environment. In addition, recycling saves the expense of purchasing new refrigerants and the subsequent taxes involved. It also ensures the availability of certain refrigerants for older stores as production levels decrease.

The data indicate that supermarkets are not heavily involved in recycling refrigerants at this time. Responding companies reported an average of only 3.2 percent of their refrigeration use invoives reclaimed or recycled compounds.

ENERGY COSTS

Energy costs are a significant factor in operating a supermarket, often approaching or even exceeding rent. According to FMI's *Supermarket Financial Performance Study*, the typical company spends the equivalent of 1.09 percent of annual sales on utilities at the store level compared with 1.25 percent on property rentals.

Many factors play a role in determining a store's overall energy bill, including the size and type of store and the number of hours open. Moreover, power rates vary widely from region to region. Because of these variables, attempting to establish a "typical" energy cost in dollars per store is meaningless. The companies responding to the survey experienced a median energy cost increase of 4.9 percent in 1990 over 1989 with a middle range of 1.0 percent to 8.3 percent.

This year's *Speaks* examines several methods of saving energy and controlling costs. Responding companies reported a median savings of $11,511 per store by the use of electronic energy controller systems. The reader is referred to the *Detailed Tabulations from the Food Marketing Industry Speaks* for information on the use of various types of electronic energy controllers, methods used to control heating and lighting costs, and HVAC systems.

BACKGROUND ON CFCS

CFCs are chemical compounds synthesized by replacing one or more hydrogen atoms in methane or ethane (hydrocarbons) with atoms of chlorine or fluorine — hence, the name chlorofluorocarbons. For many years, CFCs have been used as refrigerants because they were inexpensive, safe and non-flammable agents with high thermal efficiency. There are three groups: fully halogenated CFCs, referred to as simply CFCs; hydrochlorofluorocarbons (HCFCs) and hydrofluorocarbons (HFCs).

For further information on CFCs, see FMI's new *Guidelines for the Phaseout of Chlorofluorcarbons in the Retail Food Industry*, developed to help retailers understand the current legislation that will eliminate CFC production by the year 2000. The guidelines also explain how retailers can comply with the regulations and continue to operate their stores in an efficient manner.

METHODOLOGY

The *Food Marketing Industry Speaks, 1991* is based on data derived from several annual studies conducted by the Food Marketing Institute. The *Speaks* projects for 1991 consist of five separate surveys: total company retail operations, individual store operations, wholesale/distribution center operations, prepared food and energy issues. Supermarket and wholesale/distribution center operations are studied annually. Other topics are selected based on current needs and issues in the industry. Questionnaires were directed to selected executives in firms with 20 or more stores and to the CEOs of those firms with fewer than 20 stores.

The sample in the annual survey varies somewhat from year to year, especially among the smaller firms so direct comparability is not entirely possible. Some of the year-to-year changes in supermarket productivity and operations figures may partially reflect a change in companies responding to the survey. However, we believe that the conclusions drawn from the *Speaks* surveys provide an accurate picture of the general trends in the food distribution industry and serve as a valid indicator of the industry's response to the myriad forces in the environment in which it operates. Data from other FMI studies are included in the *Speaks* report when applicable, including *Facts About Store Development*, *Annual Financial Review*, and *Operations Review*.

FMI defines a supermarket as a retail food store with annual sales of at least $2 million.

The complete results of all the *Speaks* surveys can be found in a separate publication, the *Detailed Tabulations from the Food Marketing Industry Speaks, 1991.* Data are delineated by annual company sales, geographic region and other breakouts appropriate. Copies of the survey instruments are also included.

Unless otherwise noted, all data in the *Speaks* study are medians. The median represents the midpoint for figures in an individual measure above it and one-half below it. In calculating the median, the individual data are weighted by the number of stores or annual company sales where applicable. The median is used as an indicator of "typical" performance because it is not distorted by a few unusually high or low values that may exist in the sample due to special circumstances.

In analyzing the data and comparing it with individual company performance, it is also important to consider the "middle range." This represents the middle 50 percent of the responses, indicating that half the responses fell between two points, namely the upper and lower quartiles (see graph on the next page).

Speaks 1991 also delineates many data in the supermarket operations section by those firms in the top quartile, middle range and bottom quartile of identical store sales growth, sales per square foot and sales per labor hour. This allows the reader to examine results for the most successful firms in a given area or productivity.

When measuring real growth in sales or productivity, FMI uses the food-at-home component of the CPI to deflate dollar figures and its annual percentage increase to deflate percentage growth figures. The Bureau of Labor Statistics now uses 1982-84 dollars as a base figure for deflation. The CPI food-at-home number for 1990 is 133.3 with 100 = 1982-84, based on an average figure for the 36 months in that period. For example, to deflate the 1990 average sales per labor hour (see page 5) one divides the current number (105.00) by the 1990 food-at-home number (133.3) and then multiplies that result by 100: ($105.00/133.3) X 100 = $78.88 "real sales per labor hour." To deflate a percentage, such as the 1990 retail sales growth (p. 4), add one to the current dollar number (1 + .053) and then multiply this by the inverse of the 1990 food-at-home percentage change plus one (1/1.065). The result is 0.989 or − 1.1 percent. The table on this page charts the CPI food-at-home index and the percentage increase for the past 10 years.

Index for Deflating FMI Data*

	CPI Food at Home	% Increase
1981	94.8	7.3%
1982	98.1	3.4%
1983	99.1	1.1%
1984	102.8	3.7%
1985	104.3	1.4%
1986	107.3	2.9%
1987	111.9	4.3%
1988	116.6	4.2%
1989	124.2	6.5%
1990	133.3	6.5%

*100 = 1982-84 Dollars

SAMPLE DESCRIPTION FOR THE FOOD MARKETING INDUSTRY SPEAKS, 1991

Company Operations

(Base) Company Retail Sales (millions)	Sample Companies (228)
Under $10	28.5%
$10-$30	28.1%
$31-$100	16.7%
$101-$250	7.0%
$251-$500	4.8%
$501-$1000	3.9%
$1001-$3000	6.1%
Over $3000	4.8%

Store-Level Operations

(Base) Store Annual Sales (millions)	Sample Stores (279)
Under $5	20.1%
$5-$7.75	20.1%
$7.75-$10	12.5%
Over $10	47.3%

Prepared Foods

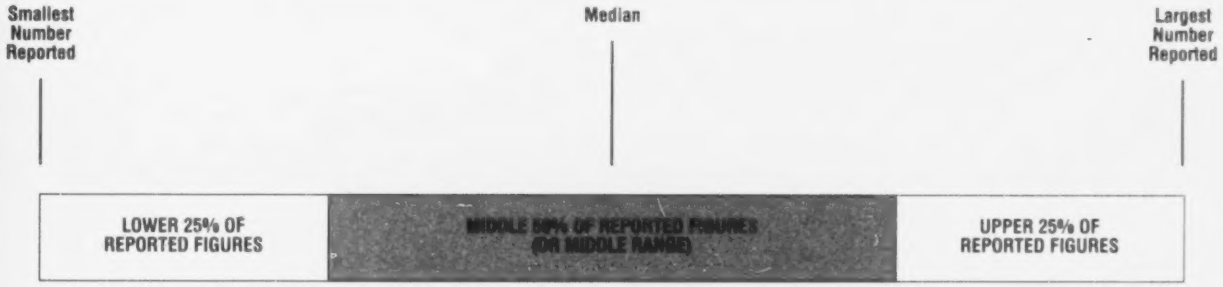
(Base) Company Retail Sales (millions)	Sample Companies (171)
Under $10	20.5%
$10-$30	26.3%
$31-$100	19.3%
$101-$250	7.6%
$251-$500	2.9%
$501-$1000	6.4%
$1001-$3000	11.1%
Over $3000	5.8%

Energy Issues

(Base) Company Retail Sales (millions)	Sample Companies (90)
Under $10	23.3%
$10-$30	7.7%
$31-$100	10.0%
$101-$250	12.2%
$251-$500	5.5%
$501-$1000	13.3%
$1001-$3000	20.0%
Over $3000	7.7%

Distribution Center Operations

(Base) Company Type	Sample Companies (72)	Sample Centers (233)
Retailers	52.7%	35.2%
Cooperative Wholesalers	9.7%	7.3%
Voluntary Wholesalers	29.1%	47.6%
Unaffiliated Wholesalers	8.3%	9.9%


Smallest Number Reported
Median
Largest Number Reported
LOWER 25% OF REPORTED FIGURES
MIDDLE 50% OF REPORTED FIGURES (OR MIDDLE RANGE)
UPPER 25% OF REPORTED FIGURES

FMI Business Building Publications

If you need data, facts or background information about key food distribution issues, FMI's research publications may be just what you're looking for.

Consumer Research

How Consumers are Shopping the Supermarket — NEW!
This new study provides valuable data on consumer shopping patterns, including how shopping behavior varies by store size and how customers shop different departments of a supermarket.
Price: FMI Members: $15
Non-members: $30

The Service Advantage-1991: How Consumers Evaluate Service in Their Supermarket Experience — NEW!
This new report addresses consumer attitudes and expectations regarding service in supermarkets.
Price: FMI Members and
Non-members: $30

Consumer Attitudes Toward Supermarket Pharmacies — NEW!
This recent study focuses on the changing retail pharmacy environment, including consumer perceptions of the relationship between the pharmacy, health and beauty care products (HBC) and the overall store.
Price: FMI Members: $15
Non-members: $30

Trends: Consumer Attitudes & the Supermarket 1991
Price: FMI Members: $25
Non-members: $50

The Green Shopping Revolution: How Solid Waste Issues are Affecting Consumer Behavior
Consumer attitudes on food shopping and solid waste.
Price: FMI Members and
Non-members: $30

Dinnertime USA
How to cash in on the dining-at-home trend.
Price: FMI Members and
Non-members: $30

Targeting Food Customers
A comprehensive guide to using secondary research for the smaller or mid-size retailer.
Price: FMI Members: $15
Non-members: $30

Shopping a la Cart: The Changing Environment of the Takeout Food Market
A report that examines the attitudes and behaviors of takeout food customers.
Price: FMI Members: $15
Non-members: $30

Financial Studies

Operating Results of Independent Supermarkets
A managerial tool to help retailers evaluate store operating results.
Price: FMI Members: $25
Non-members: $50

Profitrak Software Package for Independent Operators — NEW!
This easy-to-use software package can calculate valuable profit ratios and productivity figures.
Price: FMI Members: $125
Non-members: $175

Annual Financial Review
Annual report for the supermarket industry.
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The Food Marketing Industry Speaks

Detailed Tabulations

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The Food Marketing Institute (FMI) is a nonprofit association conducting programs in research, education and public affairs on behalf of its 1,500 members — food retailers and wholesalers and their customers in the United States and around the world. FMI's domestic member companies operate approximately 19,000 retail food stores with a combined annual sales volume of $180 billion — more than half of all grocery sales in the United States. FMI's retail membership is composed of large multi-store chains, small regional firms and independent supermarkets. Its international membership includes 250 members from 60 countries.

FOREWORD

This publication is the companion report to the *Food Marketing Industry Speaks, 1991.* It contains the detailed tabulations for the information summarized in that report.

FMI's annual surveys of food retailers and wholesalers are the primary source of the information found in this report. Any data not taken from FMI's *Speaks* surveys are indicated by a footnote.

Data are for 1990. Sales growth data are reported on an annual basis. Productivity data, e.g., sales per labor hour, sales per square foot of selling area are reported on a weekly basis.

Most of the sales and productivity figures in *Speaks* are medians. The median represents the halfway or middle figure when all figures are listed together from smallest to largest. Except where noted, the term average is used to indicate mean figures.

Data are presented only when four or more companies in a given category answered the question. In order to ensure confidentiality of individual companies, some data within different subcategories have been changed plus or minus one percent.

Each year *Speaks* studies supermarket operations, wholesale operations and distribution center operations. (Historical data on supermarket operations appears in Table 95.) *Speaks* also examines other topics based on the current needs of the industry. Areas explored in depth this year include prepared foods in the supermarket and energy issues. Also, for the first time, this year's *Speaks* examines operating results of a sample of individual stores.

Operating results for various store formats are found in Tables 18A and 18B. Sales and productivity figures are presented for four types of store: conventional, super store, combination store and warehouse store.

TABLE OF CONTENTS

Page

List of Tables vii

Companywide Retail Operations 1

Individual Store Operations 48

Prepared Foods in the Supermarket 71

Energy Issues 87

Wholesale and Distribution Center Operations 107

Appendix
  Historical Data 119
  Definitions 121
  Sample Questionnaires 123

LIST OF TABLES

Table Page

COMPANYWIDE OPERATIONS

1 Profile of Respondents 1
2 Median Percentage Change in Retail Sales, 1989 vs. 1990 3
3 Median Percentage Change in Retail Sales For Identical Stores, 1989 vs. 1990 6
4 Average Percentage of Operation Supplied By: 11
5 Median Percentage of Annual Sales Accounted for By Non-Foods (Including Health and Beauty Care, Tobacco and Other General Merchandise) 13
6 Median Percentage of Annual Sales Accounted for by Health and Beauty Care Products 19
7 Median Percentage of Annual Sales Accounted for by Tobacco 20
8 Median Percentage of Annual Sales Accounted for by Other Non-Foods (Excluding HBC and Tobacco) 21
9 Median Average Weekly Sales (in Dollars) per Supermarket in 1990 22
10 Median Average Sales (in Dollars) per Labor Hour for Store Employees in 1990 24
11 Median Average Weekly Sales (in Dollars) per Square Foot of Selling Area in 1990 28
12 Median Total Size (in Square Feet) of a Supermarket 32
13 Median of the Average Number of Items 33
14 Average of the Average Price Per Item (in Dollars) of Items Carried in a Supermarket 34
15 Median Average Sale (in Dollars) per Customer Transaction 35
16 Median Average Number of Checkouts in a Supermarket 36
17 Median Average Weekly Sales per Checkout 37
18 Profile by Store Type 38
19 Specialty/Service Departments Offered by Supermarkets 39
20 Median Percentage of Annual Sales Budgeted to Advertising—All Companies 43
21 Percentage of Firms That Include Co-Op Dollars in Their Budgets 44
22 Median Percentage of Advertising Expenses Which are Co-Op 45
23 Average Percentage of Advertising Dollars Spent on the Following Methods 46

LIST OF TABLES

Table Page

INDIVIDUAL STORE OPERATIONS

24 Profile of Respondents 48
25 Median Weekly Transactions per Square Foot of Selling Area 49
26 Median Weekly Sales per Square Foot of Selling Area 50
27 Median Sales per Labor Hour 53
28 Median Customer Transactions per Labor Hour 55
29 Median Weekly Payroll as a Percentage of Weekly Sales 57
30 Median Payroll per Labor Hour 59
31 Median Weekly Sales per Checkout 61
32 Median Sales per Customer Transaction—Entire Store 63
33 Median Number of Weekly Customer Transactions 65
34 Median Annual Sales Growth for Stores in the Sample 67
35 Median Weekly Sales per Express Checkout 69
36 Median Sales per Customer Transaction—Express Checkouts 70

PREPARED FOODS IN THE SUPERMARKET

37 Profile of Responding Companies 71
38 Percentage of Companies Viewing Prepared Foods As: 72
39 Menu Information 73
40 Percentage of Companies Using the Same Standardized Recipes in All Units 74
41 Percentage of Companies With Signature Items Preparing These Items 75
42 Percentage of Companies Offering Hot Foods To Go 75
43 Types of Hot Foods Offered 76
44 Percentage of Companies Producing "From Scratch" Deli Items In-House 76
45 Where Sausage is Made 77
46 Where Smoking Operations Are Located 77
47 Prepared Food Personnel Issues 78
48 Average Rating of Training Methods for Prepared Foods Personnel 79

LIST OF TABLES

Table Page

49 Food Safety and Packaging Issues 80

50 Executive's Average Rating of the Future Growth Potential for These Services 81

51 Executive's Average Rating of the Future Growth Potential for Prepared Foods 82

52 Executive's Average Ranking of Issues Facing Prepared Foods in the Supermarkets 84

53 Executive's Average Rating of These Statements as to Their Relative Importance in Supermarket Foodservice Departments 85

ENERGY MANAGEMENT

54 Profile of Respondents—Number of Supermarket Owned 87

55 Median of the Average Annual Energy Bill per Store in 1989 87

56 Median of the Average Annual Energy Bill per Store in 1990 88

57 Median of the Average Kilowatt-Hour per Day per 100 Square Foot of Selling Area 89

58 Median of the Average Cost per Kilowatt-Hour per Store in 1989 90

59 Median of the Average Cost per Kilowatt-Hour per Store in 1990 91

60 Median of Annual Amount Rebated to Companies by Local Utilities for Energy Efficiencies 92

61 Percentage of Stores that have HVAC Equipment 92

62 Percentage of Stores that have the Following: 93

63 Methods Used by Companies to Control Heating Costs 94

64 Methods Used by Companies to Control Air Conditioning Costs 95

65 Methods Used by Companies to Increase Inflation 96

66 Percentage of Companies Installing Energy Controllers as Standard Equipment in New Stores 97

67 Median Number of Months per Payback Period for Electronic Energy Controller Systems 98

68 Median Amount Saved Annually per Store Due to Use of Energy Controller Systems 99

LIST OF TABLES

Table Page

69 Median Annual Amount Spent per Store to Maintain Electronic Energy Controller Systems 100

70 Median Annual Savings per Store of Lost Product Due to Early Detection by Electronic Energy Controller Systems 101

71 Methods Used by Companies to Evaluate Savings from Use of Electronic Energy Controllers 101

72 Percentage of Stores Using Various Types of Main Lighting Systems 102

73 Percentage of Stores Using Various Types of Lighting Controls 102

74 Steps Taken by Companies to Control Lighting Costs 103

75 Percentage of Stores Using Various Types of Refrigeration Systems 104

76 Percentage of Stores Using Various Types of Condensing Systems 104

77 Percentage of Companies Installing Refrigeration Systems as Standard Equipment in New Stores 105

78 Average Percentage of Annual Company Refrigeration Which Utilizes Reclaimed and Recycled Refrigerant 105

79 Average Percentage of Reclaimed/Recycled Refrigerant Which is Recycled In-House or By Distributor/Manufacturer 106

DISTRIBUTION CENTER OPERATIONS

80 Profile of Responding Companies 107

81 Issues in Distribution—Average Rankings 108

82 Percentage of Companies Using Third Party Carriers and/or Third Party Warehouses 109

83 Percentage of Centers Involved in Cross Docking 109

84 Profile of Responding Centers 110

85 Median of the Average Number of Hard Cases Selected and Shipped Per Week 111

86 Median of the Average Number of Pallets Replenished (Let Downs) per Labor Hour 112

87 Median of the Average Number of Orders Processed per Week 113

88 Median of the Average Number of Inventory Turns (Annual) 114

89 Median of the Total Tonnage Throughput (In Pounds) 115

LIST OF TABLES

Table Page

90 Median of the Average Number of SKUs in the Center 116
91 Percentage of Annual Sales Volume Attributed to—Summary of Means 117
92 Services Provided to Membership 118

HISTORICAL DATA

93 Operating Results (current and historical) 119
94 Consumer Price Index 119
95 FMI Historical Data 120
96 Proportion of Income Spent on Food 120

TABLE 1A
PROFILE OF RESPONDENTS -- NUMBER OF SUPERMARKETS OPERATED

	ALL COMPANIES	ANNUAL SALES IN MILLIONS							
		UNDER $10	$10-$30	$31-$100	$101-$250	$251-$500	$501 - $1 BIL.	$1-$3 BIL.	OVER $3 BIL.
TOTAL	228	65	64	38	16	11	9	14	11
1 STORE OPERATORS	38.2%	89.2%	42.2%	5.3%	-	-	-	-	-
2 - 10 STORE COMPANIES	32.5	10.8	56.3	65.8	37.5	-	-	-	-
11 - 49 STORE COMPANIES	12.7	-	1.6	28.9	50.0	72.7	11.1	-	-
50 + STORE COMPANIES	16.7	-	-	-	12.5	27.3	88.9	100.0	100.0
INDEPENDENTS (1 - 10 STORES)	70.6	100.0	98.4	71.1	37.5	-	-	-	-
CHAINS (11 + STORES)	29.4	-	1.6	28.9	62.5	100.0	100.0	100.0	100.0

TABLE 1B
PROFILE OF RESPONDENTS -- NUMBER OF SUPERMARKETS OPERATED

	ALL COMPANIES	GEOGRAPHIC REGION OF HEADQUARTERS								
		NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH CENTRAL	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	228	21	28	51	21	38	13	8	29	19
1 STORE OPERATORS	38.2%	33.3%	50.0%	43.1%	57.1%	39.5%	30.8%	50.0%	31.0%	-
2 - 10 STORE COMPANIES	32.5	47.6	17.9	37.3	19.0	28.9	30.8	37.5	48.3	21.1
11 - 49 STORE COMPANIES	12.7	4.8	14.3	13.7	19.0	15.8	15.4	-	6.9	15.8
50 + STORE COMPANIES	16.7	14.3	17.9	5.9	4.8	15.8	23.1	12.5	13.8	63.2
INDEPENDENTS (1 - 10 STORES)	70.6	81.0	67.9	80.4	76.2	68.4	61.5	87.5	79.3	21.1
CHAINS (11 + STORES)	29.4	19.0	32.1	19.6	23.8	31.6	38.5	12.5	20.7	78.9

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 1C
PROFILE OF RESPONDENTS -- RETAIL SALES IN 1990

		NUMBER OF STORES OPERATED					
	ALL COMPANIES	1 STORE	2 - 10	11 - 49	50+	INDEPENDENT (1-10 STORES)	CHAIN (11+ STORES)
TOTAL	228	87	74	29	38	161	67
UNDER $10 MILLION	28.5%	66.7%	9.5%	-	-	40.4%	-
$10 - $30 MILLION	28.1	31.0	48.6	3.4	-	39.1	1.5
$31 - $100 MILLION	16.7	2.3	33.8	37.9	-	16.8	16.4
$101 - $250 MILLION	7.0	-	8.1	27.6	5.3	3.7	14.9
$251 - $500 MILLION	4.8	-	-	27.6	7.9	-	16.4
$501 - $1 BILLION	3.9	-	-	3.4	21.1	-	13.4
$1 BILLION - $3 BILLION	6.1	-	-	-	36.8	-	20.9
OVER $3 BILLION	4.8	-	-	-	28.9	-	16.4

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 2A
MEDIAN PERCENTAGE CHANGE IN RETAIL SALES, 1989 VS. 1990

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL COMPANIES	5.3%	1.3%	10.5%	222
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER $10	5.7	0	8.3	61
$10 - $30	4.4	1.3	8.8	63
$31 - $100	8.0	1.7	15.5	38
$101 - $250	11.7	3.4	21.3	16
$251 - $500	10.0	-2.6	13.8	11
$501 - $1 BILLION	5.4	2.3	10.0	9
$1 BILLION - $3 BILLION	7.0	1.3	10.5	14
OVER $3 BILLION	6.2	2.3	9.9	10
GEOGRAPHIC REGION OF HEADQUARTERS				
NEW ENGLAND	6.2	0	11.0	21
MID ATLANTIC	2.7	0	6.6	27
EAST NORTH CENTRAL	4.7	0	8.8	50
WEST NORTH CENTRAL	4.0	.6	9.4	21
SOUTHEAST	5.7	2.7	10.0	38
WEST SOUTH CENTRAL	2.3	0	8.8	13
MOUNTAIN	5.3	3.5	10.7	7
PACIFIC	9.1	5.3	19.7	27
CANADA	7.2	.1	12.0	18

NUMBER OF STORES

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
1 STORE	4.3	0	8.7	83
2 - 10 STORES	6.1	1.7	13.1	73
11 - 49 STORES	7.2	.5	13.8	29
50 + STORES	6.5	2.0	10.0	37
INDEPENDENTS (1 - 10 STORES)	4.9	.9	10.2	156
CHAINS (11 + STORES)	6.6	1.3	10.7	66

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 2B
LEVELS OF ANNUAL SALES GROWTH

		ANNUAL SALES IN MILLIONS							
	ALL COMPANIES	UNDER $10	$10-$30	$31-$100	$101-$250	$251-$500	$501 - $1 BIL.	$1-$3 BIL.	OVER $3 BIL.
TOTAL COMPANIES	222	61	63	38	16	11	9	14	10
MEDIAN ANNUAL SALES GROWTH	5.3%	3.7%	4.4%	8.0%	11.7%	10.0%	5.4%	7.0%	6.2%
PERCENTAGE OF COMPANIES WITH ANNUAL SALES GROWTH IN THE FOLLOWING CATEGORIES:									
LESS THAN 0%	16.2	24.6	15.9	13.2	-	27.3	-	21.4	-
UNDER 2.5%	14.9	14.8	12.7	13.2	18.8	-	33.3	14.3	30.0
2.5% TO 4.9%	17.6	23.0	27.0	10.5	12.5	-	-	7.1	10.0
5.0% TO 7.4%	12.6	9.8	14.3	13.2	12.5	-	22.2	14.3	20.0
7.5% TO 9.9%	11.3	6.6	12.7	10.5	6.3	27.3	11.1	14.3	20.0
10.0% TO 12.4%	7.2	6.6	3.2	7.9	-	9.1	22.2	21.4	10.0
12.5% AND ABOVE	20.3	14.8	14.3	31.6	50.0	36.4	11.1	7.1	10.0

TABLE 2C
LEVELS OF ANNUAL SALES GROWTH

		NUMBER OF STORES OPERATED					
	ALL COMPANIES	1 STORE	2 - 10	11 - 49	50+	INDEPENDENT (1-10 STORES)	CHAIN (11+ STORES)
TOTAL COMPANIES	222	83	73	29	37	156	66
MEDIAN ANNUAL SALES GROWTH	5.3%	4.3%	6.1%	7.2%	6.5%	4.9%	6.6%
PERCENTAGE OF COMPANIES WITH ANNUAL SALES GROWTH IN THE FOLLOWING CATEGORIES:							
LESS THAN 0%	16.2	18.1	15.1	20.7	10.8	16.7	15.2
UNDER 2.5%	14.9	14.5	12.3	6.9	27.0	13.5	18.2
2.5% TO 4.9%	17.6	25.3	17.8	10.3	5.4	21.8	7.6
5.0% TO 7.4%	12.6	14.5	9.6	13.8	13.5	12.2	13.6
7.5% TO 9.9%	11.3	8.4	11.0	13.8	16.2	9.6	15.2
10.0% TO 12.4%	7.2	6.0	5.5	-	18.9	5.8	10.6
12.5% AND ABOVE	20.3	13.3	28.8	34.5	8.1	20.5	19.7

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 2D
LEVELS OF ANNUAL SALES GROWTH

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL COMPANIES	NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH CENTRAL	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL COMPANIES	222	21	27	50	21	38	13	7	27	18
MEDIAN ANNUAL SALES GROWTH	5.3%	6.2%	2.7%	4.7%	4.0%	5.7%	2.3%	5.3%	9.1%	7.2%
PERCENTAGE OF COMPANIES WITH ANNUAL SALES GROWTH IN THE FOLLOWING CATEGORIES:										
LESS THAN 0%	16.2	23.8	22.2	22.0	19.0	7.9	15.4	14.3	-	22.2
UNDER 2.5%	14.9	9.5	22.2	8.0	19.0	13.2	38.5	-	11.1	22.2
2.5% TO 4.9%	17.6	9.5	14.8	26.0	23.8	21.1	15.4	28.6	11.1	-
5.0% TO 7.4%	12.6	9.5	18.5	10.0	4.8	21.1	-	14.3	18.5	5.6
7.5% TO 9.9%	11.3	14.3	7.4	12.0	14.3	13.2	7.7	14.3	11.1	5.6
10.0% TO 12.4%	7.2	9.5	-	2.0	9.5	2.6	7.7	14.3	14.8	22.2
12.5% AND ABOVE	20.3	23.8	14.8	20.0	9.5	21.1	15.4	14.3	33.3	22.2

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 3A
MEDIAN PERCENTAGE CHANGE IN RETAIL SALES FOR IDENTICAL STORES, 1989 VS. 1990 **

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL COMPANIES	3.7*	.2*	7.1*	209
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER $10	4.0	0	8.3	61
$10 - $30	4.0	1.5	7.1	57
$31 - $100	3.1	0	6.4	33
$101 - $250	5.4	1.3	11.1	15
$251 - $500	5.7	-.3	10.5	11
$501 - $1 BILLION	1.5	.9	7.9	9
$1 BILLION - $3 BILLION	2.2	-2.0	6.0	14
OVER $3 BILLION	4.3	3.7	5.5	9
GEOGRAPHIC REGION OF HEADQUARTERS				
NEW ENGLAND	3.7	0	6.7	19
MID ATLANTIC	2.6	-.3	6.6	27
EAST NORTH CENTRAL	4.4	.3	7.4	48
WEST NORTH CENTRAL	3.0	.6	9.4	21
SOUTHEAST	2.9	0	5.6	37
WEST SOUTH CENTRAL	1.3	0	3.7	11
MOUNTAIN	5.3	3.5	8.3	7
PACIFIC	6.4	3.7	11.1	22
CANADA	3.7	-1.5	10.5	17
NUMBER OF STORES				

Continued

TABLE 3A

MEDIAN PERCENTAGE CHANGE IN RETAIL SALES FOR IDENTICAL STORES, 1989 VS. 1990 **

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
1 STORE	4.3	0	8.3	83
2 - 10 STORES	4.0	.4	9.2	63
11 - 49 STORES	2.1	-1.5	5.7	27
50 + STORES	3.7	1.0	6.2	36
INDEPENDENTS (1 - 10 STORES)	4.2	0	8.7	146
CHAINS (11 + STORES)	2.8	.2	6.0	63

** IDENTICAL STORES ARE ONLY THOSE STORES OPEN DURING THE ENTIRE TWO-YEAR PERIOD OF 1989-1990

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 3B

MEDIAN PERCENTAGE CHANGE IN RETAIL SALES FOR IDENTICAL STORES 1989 VS. 1990 **

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL COMPANIES				
TOTAL	3.7%	.2%	7.1%	209
BOTTOM IDENTICAL STORE GROWTH	-2.2	-4.7	0	54
MIDDLE RANGE IDENTICAL STORE GROWTH	3.7	2.6	5.3	102
TOP IDENTICAL STORE GROWTH	11.1	9.2	14.5	53
1 STORE OPERATORS				
TOTAL	4.3	0	8.3	83
BOTTOM IDENTICAL STORE GROWTH	-2.7	-5.0	0	22
MIDDLE RANGE IDENTICAL STORE GROWTH	4.3	3.0	5.3	38
TOP IDENTICAL STORE GROWTH	11.1	8.8	15.2	23
2 - 10 STORE COMPANIES				
TOTAL	4.0	.4	9.2	63
BOTTOM IDENTICAL STORE GROWTH	-.6	-4.7	0	15
MIDDLE RANGE IDENTICAL STORE GROWTH	3.8	2.7	4.9	30
TOP IDENTICAL STORE GROWTH	12.3	9.8	14.5	18
11 - 49 STORE COMPANIES				
TOTAL	2.1	-1.5	5.7	27
BOTTOM IDENTICAL STORE GROWTH	-2.6	-4.8	-.6	10
MIDDLE RANGE IDENTICAL STORE GROWTH	2.8	1.9	3.3	11

Continued

TABLE 3B
MEDIAN PERCENTAGE CHANGE IN RETAIL SALES FOR IDENTICAL STORES 1989 VS. 1990 **

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
TOP IDENTICAL STORE GROWTH	14.5	9.5	20.2	6
50 + STORE COMPANIES				
TOTAL	3.7	1.0	6.2	36
BOTTOM IDENTICAL STORE GROWTH	-2.2	-4.1	-1.5	7
MIDDLE RANGE IDENTICAL STORE GROWTH	3.7	1.5	5.8	23
TOP IDENTICAL STORE GROWTH	7.9	7.8	10.0	6

TABLE 3C
LEVELS OF IDENTICAL STORE SALES GROWTH**

		ANNUAL SALES IN MILLIONS							
	ALL COMPANIES	UNDER $10	$10-$30	$31-$100	$101-$250	$251-$500	$501 - $1 BIL.	$1-$3 BIL.	OVER $3 BIL.
TOTAL COMPANIES	209	61	57	33	15	11	9	14	9
MEDIAN IDENTICAL STORE SALES GROWTH	3.7%	4.0%	4.0%	3.1%	5.4%	5.7%	1.5%	2.2%	4.3%
PERCENTAGE OF COMPANIES WITH IDENTICAL STORE SALES GROWTH IN THE FOLLOWING CATEGORIES:									
LESS THAN 0%	19.1	23.0	14.0	24.2	13.3	27.3	11.1	28.6	-
UNDER 2.5%	17.7	14.8	15.8	18.2	20.0	18.2	44.4	21.4	11.1
2.5% TO 4.9%	23.9	24.6	29.8	27.3	13.3	-	-	21.4	44.4
5.0% TO 7.4%	14.4	9.8	15.8	9.1	20.0	9.1	11.1	21.4	44.4
7.5% TO 9.9%	8.6	6.6	10.5	6.1	6.7	18.2	22.2	7.1	-
10.0 TO 12.4%	5.7	6.6	5.3	6.1	6.7	9.1	11.1	-	-
12.5 AND ABOVE	10.5	14.8	8.8	9.1	20.0	18.2	-	-	-

** IDENTICAL STORES ARE ONLY THOSE STORES OPEN DURING THE ENTIRE TWO-YEAR PERIOD FOR 1989-1990

NOTE: STORE GROWTH BASED ON THE PERCENTAGE CHANGE IN RETAIL SALES FOR IDENTICAL STORES IN 1989 VS. 1990. TOP GROWTH STORES INCLUDE THE 25 PERCENT WITH THE GREATEST INCREASE. MIDDLE RANGE GROWTH STORES INCLUDE THE 50 PERCENT WITH ANNUAL SALES INCREASE IN THE MIDDLE RANGE OF ALL RESPONSES. BOTTOM GROWTH STORES INCLUDE THE 25 PERCENT WITH THE SMALLEST INCREASE.

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 3D
LEVELS OF IDENTICAL STORE SALES GROWTH**

		NUMBER OF STORES OPERATED					
	ALL COMPANIES	1 STORE	2 - 10	11 - 49	50+	INDEPENDENT (1-10 STORES)	CHAIN (11+ STORES)
TOTAL COMPANIES	209	83	63	27	36	146	63
MEDIAN IDENTICAL STORE SALES GROWTH	3.7%	4.3%	4.0%	2.1%	3.7%	4.2%	2.8%
PERCENTAGE OF COMPANIES WITH IDENTICAL STORE SALES GROWTH IN THE FOLLOWING CATEGORIES:							
LESS THAN 0%	19.1	18.1	15.9	33.3	16.7	17.1	23.8
UNDER 2.5%	17.7	14.5	17.5	18.5	25.0	15.8	22.2
2.5% TO 4.9%	23.9	25.3	27.0	18.5	19.4	26.0	19.0
5.0% TO 7.4%	14.4	15.7	11.1	7.4	22.2	13.7	15.9
7.5% TO 9.9%	8.6	8.4	7.9	7.4	11.1	8.2	9.5
10.0 TO 12.4%	5.7	6.0	6.3	3.7	5.6	6.2	4.8
12.5 AND ABOVE	10.5	12.0	14.3	11.1	-	13.0	4.8

TABLE 3E
LEVELS OF IDENTICAL STORE SALES GROWTH**

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL COMPANIES	NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH CENTRAL	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL COMPANIES	209	19	27	48	21	37	11	7	22	17
MEDIAN IDENTICAL STORE SALES GROWTH	3.7%	3.7%	2.6%	4.4%	3.0%	2.9%	1.3%	5.3%	6.4%	3.7%
PERCENTAGE OF COMPANIES WITH IDENTICAL STORE SALES GROWTH IN THE FOLLOWING CATEGORIES:										
LESS THAN 0%	19.1	15.8	25.9	18.8	19.0	18.9	18.2	14.3	9.1	29.4
UNDER 2.5%	17.7	15.8	22.2	12.5	23.8	21.6	45.5	-	4.5	17.6
2.5% TO 4.9%	23.9	31.6	11.1	29.2	28.6	29.7	18.2	28.6	22.7	5.9
5.0% TO 7.4%	14.4	15.8	18.5	14.6	-	13.5	18.2	28.6	22.7	5.9
7.5% TO 9.9%	8.6	10.5	11.1	12.5	9.5	5.4	-	14.3	4.5	5.9
10.0 TO 12.4%	5.7	5.3	-	4.2	9.5	-	-	-	18.2	17.6
12.5 AND ABOVE	10.5	5.3	11.1	8.3	9.5	10.8	-	14.3	18.2	17.6

** IDENTICAL STORES ARE ONLY THOSE STORES OPEN DURING THE ENTIRE TWO-YEAR PERIOD FOR 1989-1990

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 4A
AVERAGE PERCENTAGE OF OPERATION SUPPLIED BY:

		ANNUAL SALES IN MILLIONS							
	ALL COMPANIES	UNDER $10	$10-$30	$31-$100	$101-$250	$251-$500	$501 - $1 BIL.	$1-$3 BIL.	OVER $3 BIL.
TOTAL	156	34	44	29	13	11	7	11	7
OWN WAREHOUSE	69.1%	9.0%	6.7%	18.6%	27.4%	33.8%	57.0%	69.3%	75.8%
VOLUNTARY WHOLESALER	1.6	29.8	30.1	19.3	16.2	0	0	.3	.9
COOPERATIVE WHOLESALER	1.8	19.6	24.9	11.0	17.7	10.8	10.1	.3	0
UNAFFILIATED WHOLESALER	4.3	7.5	3.7	15.5	10.2	22.5	0	5.3	2.7
DIRECT VENDOR DELIVERIES	23.1	34.0	34.6	35.6	28.5	32.8	32.8	24.8	20.5

TABLE 4B
AVERAGE PERCENTAGE OF OPERATION SUPPLIED BY:

		NUMBER OF STORES OPERATED					
	ALL COMPANIES	1 STORE	2 - 10	11 - 49	50+	INDEPENDENT (1-10 STORES)	CHAIN (11+ STORES)
TOTAL	156	49	51	27	29	100	56
OWN WAREHOUSE	69.1%	6.6%	9.1%	20.5%	73.6%	8.7%	70.8%
VOLUNTARY WHOLESALER	1.6	31.3	20.3	7.3	.7	22.1	1.1
COOPERATIVE WHOLESALER	1.8	23.4	17.5	19.7	.4	18.4	1.4
UNAFFILIATED WHOLESALER	4.3	6.5	14.8	21.0	3.1	13.5	4.0
DIRECT VENDOR DELIVERIES	23.1	32.2	38.4	31.4	22.2	37.4	22.7

NOTE: DATA WEIGHTED BY 1990 SALES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 4C
AVERAGE PERCENTAGE OF OPERATION SUPPLIED BY:

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL COMPANIES	NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH CENTRAL	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	156	13	15	39	13	25	11	5	17	18
OWN WAREHOUSE	69.1%	56.0%	63.2%	74.0%	25.8%	78.2%	75.9%	62.6%	67.5%	64.8%
VOLUNTARY WHOLESALER	1.6	5.3	1.5	1.7	9.1	1.9	1.4	5.0	0	.4
COOPERATIVE WHOLESALER	1.8	0	4.4	1.6	2.9	.5	4.0	.4	1.1	2.0
UNAFFILIATED WHOLESALER	4.3	16.3	10.4	1.1	35.4	2.3	9.1	0	6.3	0
DIRECT VENDOR DELIVERIES	23.1	22.4	20.5	21.7	26.8	17.1	9.5	32.0	25.0	32.8

NOTE: DATA WEIGHTED BY 1990 SALES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 5A

MEDIAN PERCENTAGE OF ANNUAL SALES ACCOUNTED FOR BY NON-FOODS (INCLUDING HEALTH AND BEAUTY CARE, TOBACCO AND OTHER GENERAL MERCHANDISE)

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL COMPANIES	12.0%	7.4%	13.5%	150
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER $10	9.0	6.0	11.8	34
$10 - $30	9.9	6.1	12.0	42
$31 - $100	10.0	7.0	15.3	25
$101 - $250	10.0	6.0	10.7	13
$251 - $500	9.2	5.8	9.3	10
$501 - $1 BILLION	9.0	7.1	9.9	8
$1 BILLION - $3 BILLION	11.9	8.0	16.8	11
OVER $3 BILLION	12.1	7.4	13.5	7
GEOGRAPHIC REGION OF HEADQUARTERS				
NEW ENGLAND	7.8	5.2	7.8	12
MID ATLANTIC	7.4	7.4	9.7	17
EAST NORTH CENTRAL	12.0	11.9	12.1	36
WEST NORTH CENTRAL	14.7	14.0	14.7	14
SOUTHEAST	6.4	6.3	9.0	22
WEST SOUTH CENTRAL	16.8	9.0	16.8	10
MOUNTAIN	20.5	20.5	20.5	6
PACIFIC	13.5	13.5	14.0	16
CANADA	8.0	5.3	10.4	17
NUMBER OF STORES				
1 STORE	10.0	6.5	13.6	49
2 - 10 STORES	9.0	5.3	10.8	47
11 - 49 STORES	9.9	7.8	12.8	24
50 + STORES	12.1	7.4	13.5	30
INDEPENDENTS (1 - 10 STORES)	10.0	5.7	11.0	96
CHAINS (11 + STORES)	12.0	7.4	13.5	54

NOTE: DATA WEIGHTED BY 1990 SALES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 5B

MEDIAN PERCENTAGE OF ANNUAL SALES ACCOUNTED FOR BY NON-FOODS (INCLUDING HEALTH AND BEAUTY CARE, TOBACCO AND OTHER GENERAL MERCHANDISE)

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL COMPANIES				
TOTAL	12.0%	7.4%	13.5%	150
BOTTOM IDENTICAL STORE GROWTH	8.7	8.0	11.9	30
MIDDLE RANGE IDENTICAL STORE GROWTH	12.0	7.4	13.5	73
TOP IDENTICAL STORE GROWTH	8.0	5.0	14.4	33
1 STORE OPERATORS				
TOTAL	10.0	6.5	13.6	49
BOTTOM IDENTICAL STORE GROWTH	10.5	9.2	14.0	11
MIDDLE RANGE IDENTICAL STORE GROWTH	10.0	6.2	13.6	25
TOP IDENTICAL STORE GROWTH	8.2	8.0	12.0	10
2 - 10 STORE COMPANIES				
TOTAL	9.0	5.3	10.8	47
BOTTOM IDENTICAL STORE GROWTH	8.2	5.2	10.6	5
MIDDLE RANGE IDENTICAL STORE GROWTH	10.4	7.6	11.0	23
TOP IDENTICAL STORE GROWTH	5.7	4.5	12.0	11
11 - 49 STORE COMPANIES				
TOTAL	9.9	7.8	12.8	24
BOTTOM IDENTICAL STORE GROWTH	9.9	8.9	12.8	7
MIDDLE RANGE IDENTICAL STORE GROWTH	6.0	5.8	14.2	9

Continued

TABLE 5B

MEDIAN PERCENTAGE OF ANNUAL SALES ACCOUNTED FOR BY NON-FOODS (INCLUDING HEALTH AND BEAUTY CARE, TOBACCO AND OTHER GENERAL MERCHANDISE)

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
TOP IDENTICAL STORE GROWTH	8.0	7.8	14.4	6
50 + STORE COMPANIES				
TOTAL	12.1	7.4	13.5	30
BOTTOM IDENTICAL STORE GROWTH	8.7	8.0	11.9	7
MIDDLE RANGE IDENTICAL STORE GROWTH	12.1	7.4	13.5	16
TOP IDENTICAL STORE GROWTH	9.3	4.8	27.5	6

** IDENTICAL STORES ARE ONLY THOSE STORES OPEN DURING THE ENTIRE TWO-YEAR PERIOD FOR 1989-1990

NOTE: STORE GROWTH BASED ON THE PERCENTAGE CHANGE IN RETAIL SALES FOR IDENTICAL STORES IN 1989 VS. 1990.

TOP GROWTH STORES INCLUDE THE 25 PERCENT WITH THE GREATEST INCREASE. MIDDLE RANGE GROWTH STORES INCLUDE THE 50 PERCENT WITH ANNUAL SALES INCREASE IN THE MIDDLE RANGE OF ALL RESPONSES.

BOTTOM GROWTH STORES INCLUDE THE 25 PERCENT WITH THE SMALLEST INCREASE.

NOTE: DATA WEIGHTED BY 1990 SALES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 5C

MEDIAN PERCENTAGE OF ANNUAL SALES ACCOUNTED FOR BY NON-FOODS (INCLUDING HEALTH AND BEAUTY CARE, TOBACCO AND OTHER GENERAL MERCHANDISE)

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL COMPANIES				
TOTAL	12.0%	7.4%	13.5%	150
BOTTOM SALES PER SQUARE FOOT	7.4	6.4	7.8	74
MIDDLE RANGE SALES PER SQUARE FOOT	12.0	12.0	13.5	30
TOP SALES PER SQUARE FOOT	14.0	11.6	16.8	41
1 STORE OPERATORS				
TOTAL	10.0	6.5	13.6	49
BOTTOM SALES PER SQUARE FOOT	8.4	6.1	14.0	19
MIDDLE RANGE SALES PER SQUARE FOOT	8.2	6.0	10.8	11
TOP SALES PER SQUARE FOOT	10.0	8.0	12.0	18
2 - 10 STORE COMPANIES				
TOTAL	9.0	5.3	10.8	47
BOTTOM SALES PER SQUARE FOOT	8.2	5.2	11.8	27
MIDDLE RANGE SALES PER SQUARE FOOT	7.1	5.0	8.0	8
TOP SALES PER SQUARE FOOT	10.4	5.7	10.7	12
11 - 49 STORE COMPANIES				
TOTAL	9.9	7.8	12.8	24
BOTTOM SALES PER SQUARE FOOT	12.8	8.9	14.4	14
MIDDLE RANGE SALES PER SQUARE FOOT				1
TOP SALES-PER SQUARE FOOT	8.4	5.8	9.9	6
50 + STORE COMPANIES				
TOTAL	12.1	7.4	13.5	30
BOTTOM SALES PER SQUARE FOOT	7.4	6.4	7.4	14
MIDDLE RANGE SALES PER SQUARE FOOT	12.0	12.0	13.5	10
TOP SALES PER SQUARE FOOT	14.0	12.7	16.8	5

NOTE: BOTTOM STORES ARE THE 25 PERCENT WITH THE LOWEST SALES PER SQUARE FOOT.

TOP STORES INCLUDE THE 25 PERCENT WITH THE HIGHEST SALES PER SQUARE FOOT.

NOTE: DATA WEIGHTED BY 1990 SALES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 5D
PERCENTAGE OF ANNUAL SALES ACCOUNTED FOR BY NON-FOODS (INCLUDING HEALTH AND BEAUTY CARE, TOBACCO AND OTHER GENERAL MERCHANDISE)

		ANNUAL SALES IN MILLIONS							
	ALL COMPANIES	UNDER $10	$10-$30	$31-$100	$101-$250	$251-$500	$501 - $1 BIL.	$1-$3 BIL.	OVER $3 BIL.
MEDIAN PERCENTAGE OF ANNUAL SALES ACCOUNTED FOR BY NON-FOODS	12.0%	9.0%	9.9%	10.0%	10.0%	9.2%	9.0%	11.9%	12.0%
PERCENTAGE OF COMPANIES WITH THE PERCENTAGE OF NON-FOOD SALES IN THE FOLLOWING CATEGORIES:									
UNDER 2.5%	.4	6.5	3.1	-	-	10.8	-	-	-
2.5% TO 4.9%	2.9	4.8	10.1	5.0	14.3	-	12.3	8.5	-
5.0% TO 7.4%	25.5	23.5	22.2	22.0	10.9	15.8	26.8	6.5	32.1
7.5% TO 9.9%	11.3	24.7	15.9	22.4	18.5	48.9	36.9	32.3	-
10.0 TO 12.4%	25.7	17.5	32.8	17.7	50.3	-	12.1	5.9	33.6
12.5 AND ABOVE	34.2	23.0	15.9	32.9	6.0	24.5	11.9	46.9	34.4

TABLE 5E
PERCENTAGE OF ANNUAL SALES ACCOUNTED FOR BY NON-FOODS (INCLUDING HEALTH AND BEAUTY CARE, TOBACCO AND OTHER GENERAL MERCHANDISE)

		NUMBER OF STORES OPERATED					
	ALL COMPANIES	1 STORE	2 - 10	11 - 49	50+	INDEPENDENT (1-10 STORES)	CHAIN (11+ STORES)
MEDIAN PERCENTAGE OF ANNUAL SALES ACCOUNTED FOR BY NON-FOODS	12.0%	10.0%	9.0%	9.9%	12.0%	10.0%	12.0%
PERCENTAGE OF COMPANIES WITH THE PERCENTAGE OF NON-FOOD SALES IN THE FOLLOWING CATEGORIES:							
UNDER 2.5%	.4	1.4	1.3	-	.4	1.3	.4
2.5% TO 4.9%	2.9	5.3	15.1	2.6	2.6	13.4	2.6
5.0% TO 7.4%	25.5	22.9	20.5	15.4	26.1	20.9	25.6
7.5% TO 9.9%	11.3	17.5	13.2	38.1	9.9	14.0	11.2
10.0 TO 12.4%	25.7	26.1	40.5	14.1	25.9	38.1	25.4
12.5 AND ABOVE	34.2	26.8	9.4	29.8	35.1	12.3	34.8

NOTE: DATA WEIGHTED BY 1990 SALES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 5F

PERCENTAGE OF ANNUAL SALES ACCOUNTED FOR BY NON-FOODS (INCLUDING HEALTH AND BEAUTY CARE, TOBACCO AND OTHER GENERAL MERCHANDISE)

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL COMPANIES	NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH CENTRAL	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
MEDIAN PERCENTAGE OF ANNUAL SALES ACCOUNTED FOR BY NON-FOODS	12.0%	7.8%	7.4%	12.0%	14.7%	6.4%	16.8%	20.5%	13.5%	8.0%
PERCENTAGE OF COMPANIES WITH THE PERCENTAGE OF NON-FOOD SALES IN THE FOLLOWING CATEGORIES:										
UNDER 2.5%	.4	3.2	-	.1	-	-	-	-	-	2.9
2.5% TO 4.9%	2.9	11.7	-	.7	.8	1	-	.2	-	19.7
5.0% TO 7.4%	25.5	17.9	70.8	2.0	1.9	61.9	16.7	-	.8	13.5
7.5% TO 9.9%	11.3	57.4	25.1	.5	-	16.0	16.9	.6	.6	22.0
10.0 TO 12.4%	25.7	8.4	2.4	94.4	4.3	-	3.9	.1	1.9	26.6
12.5 AND ABOVE	34.2	1.6	1.7	2.4	92.9	22.0	62.5	99.1	96.8	15.2

NOTE: DATA WEIGHTED BY 1990 SALES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 6

MEDIAN PERCENTAGE OF ANNUAL SALES ACCOUNTED FOR BY HEALTH AND BEAUTY CARE PRODUCTS

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL COMPANIES	3.8%	3.0%	6.9%	111
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER $10	3.0	1.9	4.5	24
$10 - $30	3.0	2.3	3.8	36
$31 - $100	2.5	2.0	4.0	21
$101 - $250	3.5	2.6	4.0	8
$251 - $500	2.5	1.5	4.4	6
$501 - $1 BILLION	2.0	2.0	2.0	4
$1 BILLION - $3 BILLION	5.0	3.8	8.6	7
OVER $3 BILLION	5.0	3.0	6.9	5
GEOGRAPHIC REGION OF HEADQUARTERS				
NEW ENGLAND	4.4	2.4	4.4	12
MID ATLANTIC	3.0	3.0	3.0	10
EAST NORTH CENTRAL	3.2	2.8	3.2	29
WEST NORTH CENTRAL	4.5	4.5	4.5	13
SOUTHEAST	3.3	3.3	3.3	12
WEST SOUTH CENTRAL	8.6	8.6	8.6	7
MOUNTAIN	7.0	7.0	7.0	5
PACIFIC	5.0	5.0	5.0	10
CANADA	2.0	1.5	5.0	13
NUMBER OF STORES				
1 STORE	3.0	1.9	4.5	40
2 - 10 STORES	3.0	2.4	3.7	36
11 - 49 STORES	4.4	3.1	5.0	14
50 + STORES	3.9	3.0	6.9	21
INDEPENDENTS (1 - 10 STORES)	3.0	2.4	3.8	76
CHAINS (11 + STORES)	3.8	3.0	6.9	35

NOTE: DATA WEIGHTED BY 1990 SALES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 7

MEDIAN PERCENTAGE OF ANNUAL SALES ACCOUNTED FOR BY TOBACCO

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL COMPANIES	3.0%	1.1%	3.5%	99
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER $10	3.6	2.1	6.1	21
$10 - $30	3.5	1.0	5.0	29
$31 - $100	4.2	2.3	5.3	20
$101 - $250	2.0	.5	5.1	7
$251 - $500	3.7	.9	4.0	6
$501 - $1 BILLION	2.0	2.0	2.8	4
$1 BILLION - $3 BILLION	2.0	1.8	3.5	8
OVER $3 BILLION	2.9	.5	3.0	4
GEOGRAPHIC REGION OF HEADQUARTERS				
NEW ENGLAND	2.0	2.0	2.0	10
MID ATLANTIC	.5	.5	.5	9
EAST NORTH CENTRAL	4.0	2.0	4.0	24
WEST NORTH CENTRAL	2.4	2.4	4.0	11
SOUTHEAST	1.1	1.1	2.0	11
WEST SOUTH CENTRAL	2.0	2.0	2.0	7
MOUNTAIN	3.5	3.5	3.5	4
PACIFIC	3.0	2.0	3.0	10
CANADA	4.3	1.5	7.5	13
NUMBER OF STORES				
1 STORE	3.5	2.0	4.8	35
2 - 10 STORES	3.3	1.7	5.1	30
11 - 49 STORES	2.0	1.0	4.0	13
50 + STORES	3.0	1.1	3.5	21
INDEPENDENTS (1 - 10 STORES)	3.3	1.7	5.0	65
CHAINS (11 + STORES)	3.0	1.1	3.5	34

NOTE: DATA WEIGHTED BY 1990 SALES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 8

MEDIAN PERCENTAGE OF ANNUAL SALES ACCOUNTED FOR BY OTHER NON-FOODS (EXCLUDING HBC AND TOBACCO)

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL COMPANIES	3.9%	3.1%	6.0%	109
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER $10	2.0	1.1	4.5	23
$10 - $30	3.0	1.8	4.3	36
$31 - $100	2.2	1.1	4.0	21
$101 - $250	2.8	1.5	6.9	7
$251 - $500	1.4	.8	3.0	6
$501 - $1 BILLION	5.0	5.0	6.0	4
$1 BILLION - $3 BILLION	2.5	2.4	7.8	7
OVER $3 BILLION	4.7	3.9	5.5	5
GEOGRAPHIC REGION OF HEADQUARTERS				
NEW ENGLAND	1.4	1.1	1.4	12
MID ATLANTIC	3.9	3.8	4.0	10
EAST NORTH CENTRAL	3.8	2.2	3.8	29
WEST NORTH CENTRAL	7.8	3.9	7.8	11
SOUTHEAST	3.1	3.1	4.7	12
WEST SOUTH CENTRAL	6.2	6.2	6.2	7
MOUNTAIN	10.0	9.9	10.1	5
PACIFIC	5.5	5.4	5.6	12
CANADA	1.7	1.0	1.7	11
NUMBER OF STORES				
1 STORE	3.0	1.6	4.5	38
2 - 10 STORES	2.8	1.2	4.6	36
11 - 49 STORES	2.0	1.5	3.9	14
50 + STORES	4.7	3.1	6.0	21
INDEPENDENTS (1 - 10 STORES)	2.8	1.3	4.6	74
CHAINS (11 + STORES)	3.9	3.1	6.0	35

NOTE: DATA WEIGHTED BY 1990 SALES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 9A

MEDIAN AVERAGE WEEKLY SALES (IN DOLLARS) PER SUPERMARKET IN 1990

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL STORES	$174800	$152853	$282000	11024
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER $10	87554	64423	122077	72
$10 - $30	149950	95673	204102	154
$31 - $100	128205	96716	214953	296
$101 - $250	185439	141000	261293	332
$251 - $500	102803	95295	266500	438
$501 - $1 BILLION	171000	137031	195346	742
$1 BILLION - $3 BILLION	188152	114527	335780	2213
OVER $3 BILLION	236790	152900	282250	6777
GEOGRAPHIC REGION OF HEADQUARTERS				
NEW ENGLAND	485576	416000	506851	343
MID ATLANTIC	167252	167100	188152	1910
EAST NORTH CENTRAL	282000	281800	282250	1660
WEST NORTH CENTRAL	190481	85578	335780	180
SOUTHEAST	152853	138036	153000	2677
WEST SOUTH CENTRAL	172000	137031	342382	392
MOUNTAIN	297600	297400	297900	544
PACIFIC	236790	236600	315103	1529
CANADA	114527	89114	203304	1789
NUMBER OF STORES				
1 STORE	127520	85000	217000	87
2 - 10 STORES	175566	104000	243076	319
11 - 49 STORES	185439	127225	324000	509
50 + STORES	174500	152853	282000	10109
INDEPENDENTS (1 - 10 STORES)	166667	100800	239615	406
CHAINS (11 + STORES)	174711	152853	282000	10618

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 9B

MEDIAN AVERAGE WEEKLY SALES (IN DOLLARS) PER SUPERMARKET IN 1990

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL STORES				
TOTAL	$174800	$152853	$282000	11024
BOTTOM IDENTICAL STORE GROWTH	174711	89114	203304	1260
MIDDLE RANGE IDENTICAL STORE GROWTH	172000	152853	282000	8734
TOP IDENTICAL STORE GROWTH	173931	95295	293621	706
1 STORE OPERATORS				
TOTAL	127520	85000	217000	87
BOTTOM IDENTICAL STORE GROWTH	115385	60000	169854	22
MIDDLE RANGE IDENTICAL STORE GROWTH	155196	108000	301864	38
TOP IDENTICAL STORE GROWTH	108850	72383	190000	23
2 - 10 STORE COMPANIES				
TOTAL	175566	104000	243076	319
BOTTOM IDENTICAL STORE GROWTH	128205	95673	215673	52
MIDDLE RANGE IDENTICAL STORE GROWTH	183334	100800	239615	146
TOP IDENTICAL STORE GROWTH	199038	175000	396426	77
11 - 49 STORE COMPANIES				
TOTAL	185439	127225	324000	509
BOTTOM IDENTICAL STORE GROWTH	158147	114073	339900	166
MIDDLE RANGE IDENTICAL STORE GROWTH	171121	85578	321000	183
TOP IDENTICAL STORE GROWTH	258873	173931	293621	120
50 + STORE COMPANIES				
TOTAL	174500	152853	282000	10109
BOTTOM IDENTICAL STORE GROWTH	174600	89114	203304	1020
MIDDLE RANGE IDENTICAL STORE GROWTH	172000	152853	282000	8367
TOP IDENTICAL STORE GROWTH	115969	95295	195346	486

** IDENTICAL STORES ARE ONLY THOSE STORES OPEN DURING THE ENTIRE TWO-YEAR PERIOD FOR 1989-1990

NOTE: STORE GROWTH BASED ON THE PERCENTAGE CHANGE IN RETAIL SALES FOR IDENTICAL STORES IN 1989 VS. 1990. TOP GROWTH STORES INCLUDE THE 25 PERCENT WITH THE GREATEST INCREASE. MIDDLE RANGE GROWTH STORES INCLUDE THE 50 PERCENT WITH ANNUAL SALES INCREASE IN THE MIDDLE RANGE OF ALL RESPONSES. BOTTOM GROWTH STORES INCLUDE THE 25 PERCENT WITH THE SMALLEST INCREASE.

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 10A

MEDIAN AVERAGE SALES (IN DOLLARS) PER LABOR HOUR FOR STORE EMPLOYEES IN 1990

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL STORES	$105.00	$86.00	$108.00	10366
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER $10	80.39	69.23	87.72	65
$10 - $30	82.02	75.00	93.71	147
$31 - $100	93.00	81.78	102.80	245
$101 - $250	80.46	70.26	132.54	296
$251 - $500	100.00	89.56	102.00	272
$501 - $1 BILLION	87.85	85.20	98.44	663
$1 BILLION - $3 BILLION	103.00	88.15	110.94	2137
OVER $3 BILLION	106.29	86.00	108.20	6541
GEOGRAPHIC REGION OF HEADQUARTERS				
NEW ENGLAND	108.32	107.50	109.28	267
MID ATLANTIC	108.20	107.25	109.20	1898
EAST NORTH CENTRAL	86.00	85.20	86.80	1556
WEST NORTH CENTRAL	93.53	82.02	93.80	180
SOUTHEAST	87.80	79.20	108.08	2643
WEST SOUTH CENTRAL	87.85	85.89	88.73	391
MOUNTAIN	104.75	94.28	115.22	542
PACIFIC	106.29	100.00	136.29	1502
CANADA	88.75	88.15	108.19	1387
NUMBER OF STORES				
1 STORE	82.10	69.67	92.81	80
2 - 10 STORES	89.04	78.00	102.51	306
11 - 49 STORES	89.56	78.99	100.00	428
50 + STORES	104.00	86.00	108.20	9552
INDEPENDENTS (1 - 10 STORES)	89.00	75.00	101.00	386
CHAINS (11 + STORES)	104.75	86.00	108.20	9980

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 10B

MEDIAN AVERAGE SALES (IN DOLLARS) PER LABOR HOUR FOR STORE EMPLOYEES IN 1990

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL COMPANIES				
TOTAL	$105.00	$86.00	$108.00	10366
BOTTOM IDENTICAL STORE GROWTH	93.53	88.15	108.19	1260
MIDDLE RANGE IDENTICAL STORE GROWTH	106.17	86.00	108.20	8597
TOP IDENTICAL STORE GROWTH	88.23	85.20	102.45	448
1 STORE OPERATORS				
TOTAL	82.10	69.67	92.81	80
BOTTOM IDENTICAL STORE GROWTH	80.40	68.83	90.00	22
MIDDLE RANGE IDENTICAL STORE GROWTH	83.19	73.72	93.61	33
TOP IDENTICAL STORE GROWTH	83.33	70.10	97.03	21
2 - 10 STORE COMPANIES				
TOTAL	89.04	78.00	102.51	306
BOTTOM IDENTICAL STORE GROWTH	83.95	74.50	101.00	52
MIDDLE RANGE IDENTICAL STORE GROWTH	85.00	75.00	112.24	142
TOP IDENTICAL STORE GROWTH	96.85	85.00	104.53	77
11 - 49 STORE COMPANIES				
TOTAL	89.56	78.99	100.00	428
BOTTOM IDENTICAL STORE GROWTH	93.80	93.00	114.12	166
MIDDLE RANGE IDENTICAL STORE GROWTH	79.42	78.99	89.56	131
TOP IDENTICAL STORE GROWTH	81.20	80.46	100.00	109
50 + STORE COMPANIES				
TOTAL	104.00	86.00	108.20	9552
BOTTOM IDENTICAL STORE GROWTH	93.53	88.15	108.19	1020
MIDDLE RANGE IDENTICAL STORE GROWTH	106.29	86.00	108.20	8291
TOP IDENTICAL STORE GROWTH	85.20	85.20	96.28	241

** IDENTICAL STORES ARE ONLY THOSE STORES OPEN DURING THE ENTIRE TWO-YEAR PERIOD FOR 1989-1990

NOTE: STORE GROWTH BASED ON THE PERCENTAGE CHANGE IN RETAIL SALES FOR IDENTICAL STORES IN 1989 VS. 1990. TOP GROWTH STORES INCLUDE THE 25 PERCENT WITH THE GREATEST INCREASE. MIDDLE RANGE GROWTH STORES INCLUDE THE 50 PERCENT WITH ANNUAL SALES INCREASE IN THE MIDDLE RANGE OF ALL RESPONSES. BOTTOM GROWTH STORES INCLUDE THE 25 PERCENT WITH THE SMALLEST INCREASE.

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 10C
MEDIAN AVERAGE SALES (IN DOLLARS) PER LABOR HOUR FOR STORE EMPLOYEES IN 1990

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL COMPANIES				
TOTAL	$105.00	$86.00	$108.00	10366
BOTTOM AVERAGE WEEKLY SALES	87.85	79.20	108.08	3395
MIDDLE RANGE AVERAGE WEEKLY SALES	108.19	106.29	108.20	3841
TOP AVERAGE WEEKLY SALES	93.53	86.00	108.32	3130
1 STORE OPERATORS				
TOTAL	82.10	69.67	92.81	80
BOTTOM AVERAGE WEEKLY SALES	80.05	68.06	88.41	48
MIDDLE RANGE AVERAGE WEEKLY SALES	90.00	75.29	97.50	23
TOP AVERAGE WEEKLY SALES	93.33	73.72	108.04	9
2 - 10 STORE COMPANIES				
TOTAL	89.04	78.00	102.51	306
BOTTOM AVERAGE WEEKLY SALES	82.92	74.05	100.00	138
MIDDLE RANGE AVERAGE WEEKLY SALES	93.10	82.33	103.80	100
TOP AVERAGE WEEKLY SALES	102.45	89.04	120.47	68
11 - 49 STORE COMPANIES				
TOTAL	89.56	78.99	100.00	428
BOTTOM AVERAGE WEEKLY SALES	84.68	73.75	95.00	140
MIDDLE RANGE AVERAGE WEEKLY SALES	81.20	78.99	100.00	161
TOP AVERAGE WEEKLY SALES	106.00	73.36	113.90	127
50 + STORE COMPANIES				
TOTAL	105.00	86.00	108.20	9552
BOTTOM AVERAGE WEEKLY SALES	88.15	79.20	108.08	3069
MIDDLE RANGE AVERAGE WEEKLY SALES	108.19	106.29	108.20	3557
TOP AVERAGE WEEKLY SALES	93.53	86.00	106.17	2926

NOTE: BOTTOM STORES ARE THE 25 PERCENT WITH THE LOWEST WEEKLY SALES.

TOP STORES INCLUDE THE 25 PERCENT WITH THE HIGHEST WEEKLY SALES.

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 10D

MEDIAN AVERAGE SALES (IN DOLLARS) PER LABOR HOUR FOR STORE EMPLOYEES IN 1990

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL COMPANIES				
TOTAL	$105.00	$86.00	$108.00	10366
BOTTOM SALES PER SQ. FT.	98.44	79.20	108.20	5180
MIDDLE RANGE SALES PER SQ. FT.	104.75	86.00	106.29	3834
TOP SALES PER SQ. FT.	109.28	106.00	148.35	1296
1 STORE OPERATORS				
TOTAL	82.10	69.67	92.81	80
BOTTOM SALES PER SQ. FT.	81.00	68.83	90.00	39
MIDDLE RANGE SALES PER SQ. FT.	75.29	69.34	92.00	15
TOP SALES PER SQ. FT.	89.27	73.72	97.03	26
2 - 10 STORE COMPANIES				
TOTAL	89.04	78.00	102.51	306
BOTTOM SALES PER SQ. FT.	85.00	74.50	101.00	185
MIDDLE RANGE SALES PER SQ. FT.	89.13	85.00	93.74	32
TOP SALES PER SQ. FT.	97.77	85.79	120.93	89
11 - 49 STORE COMPANIES				
TOTAL	89.56	78.99	100.00	428
BOTTOM SALES PER SQ. FT.	84.68	80.46	100.00	247
MIDDLE RANGE SALES PER SQ. FT.	67.73	67.73	67.73	21
TOP SALES PER SQ. FT.	106.00	73.36	116.86	104
50 + STORE COMPANIES				
TOTAL	104.00	86.00	108.20	9552
BOTTOM SALES PER SQ. FT.	102.00	79.20	108.20	4709
MIDDLE RANGE SALES PER SQ. FT.	104.75	86.00	106.29	3766
TOP SALES PER SQ. FT.	109.28	106.17	170.33	1077

NOTE: BOTTOM STORES ARE THE 25 PERCENT WITH THE LOWEST SALES PER SQUARE FOOT.
TOP STORES INCLUDE THE 25 PERCENT WITH THE HIGHEST SALES PER SQUARE FOOT.

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 11A

MEDIAN AVERAGE WEEKLY SALES (IN DOLLARS) PER SQUARE FOOT OF SELLING AREA IN 1990

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL STORES	$9.00	$7.15	$10.57	10720
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER $10	7.14	5.85	9.72	72
$10 - $30	8.28	4.62	11.00	134
$31 - $100	7.02	5.61	8.32	282
$101 - $250	6.68	6.36	8.08	321
$251 - $500	7.94	7.68	10.59	415
$501 - $1 BILLION	8.11	6.24	8.12	742
$1 BILLION - $3 BILLION	10.00	8.84	10.23	2213
OVER $3 BILLION	8.25	7.15	10.57	6541
GEOGRAPHIC REGION OF HEADQUARTERS				
NEW ENGLAND	16.02	15.58	16.02	343
MID ATLANTIC	8.26	8.15	8.29	1899
EAST NORTH CENTRAL	10.50	10.45	10.67	1637
WEST NORTH CENTRAL	6.00	5.35	10.05	161
SOUTHEAST	7.15	6.12	7.21	2663
WEST SOUTH CENTRAL	5.36	4.76	11.31	391
MOUNTAIN	10.40	10.29	10.48	544
PACIFIC	10.35	10.27	12.24	1529
CANADA	9.24	8.11	10.23	1553
NUMBER OF STORES				
1 STORE	9.41	6.77	11.76	86
2 - 10 STORES	7.94	5.77	10.97	319
11 - 49 STORES	7.30	5.92	10.92	442
50 + STORES	9.24	7.15	10.57	9873
INDEPENDENTS (1 - 10 STORES)	8.25	5.88	10.97	405
CHAINS (11 + STORES)	8.94	7.15	10.57	10315

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 11B

MEDIAN AVERAGE WEEKLY SALES (IN DOLLARS) PER SQUARE FOOT OF SELLING AREA IN 1990

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL COMPANIES				
TOTAL	$9.00	$7.15	$10.57	10720
BOTTOM IDENTICAL STORE GROWTH	9.33	7.05	10.23	1246
MIDDLE RANGE IDENTICAL STORE GROWTH	8.84	7.15	10.57	8691
TOP IDENTICAL STORE GROWTH	8.94	7.68	10.59	695
1 STORE OPERATORS				
TOTAL	9.41	6.77	11.76	86
BOTTOM IDENTICAL STORE GROWTH	9.06	6.35	10.77	22
MIDDLE RANGE IDENTICAL STORE GROWTH	10.41	8.14	14.46	37
TOP IDENTICAL STORE GROWTH	7.88	6.40	10.89	23
2 - 10 STORE COMPANIES				
TOTAL	7.94	5.77	10.97	319
BOTTOM IDENTICAL STORE GROWTH	8.03	5.19	8.55	52
MIDDLE RANGE IDENTICAL STORE GROWTH	7.94	5.00	10.41	146
TOP IDENTICAL STORE GROWTH	10.00	7.67	11.32	77
11 - 49 STORE COMPANIES				
TOTAL	7.30	5.92	10.92	442
BOTTOM IDENTICAL STORE GROWTH	6.17	5.35	15.72	152
MIDDLE RANGE IDENTICAL STORE GROWTH	6.00	5.85	8.08	141
TOP IDENTICAL STORE GROWTH	8.19	7.30	9.92	109
50 + STORE COMPANIES				
TOTAL	9.24	7.15	10.57	9873
BOTTOM IDENTICAL STORE GROWTH	9.33	7.05	10.23	1020
MIDDLE RANGE IDENTICAL STORE GROWTH	8.84	7.15	10.57	8367
TOP IDENTICAL STORE GROWTH	8.94	8.11	10.59	486

** IDENTICAL STORES ARE ONLY THOSE STORES OPEN DURING THE ENTIRE TWO-YEAR PERIOD FOR 1989-1990

NOTE: STORE GROWTH BASED ON THE PERCENTAGE CHANGE IN RETAIL SALES FOR IDENTICAL STORES IN 1989 VS. 1990. TOP GROWTH STORES INCLUDE THE 25 PERCENT WITH THE GREATEST INCREASE. MIDDLE RANGE GROWTH STORES INCLUDE THE 50 PERCENT WITH ANNUAL SALES INCREASE IN THE MIDDLE RANGE OF ALL RESPONSES. BOTTOM GROWTH STORES INCLUDE THE 25 PERCENT WITH THE SMALLEST INCREASE.

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 11C

MEDIAN AVERAGE WEEKLY SALES (IN DOLLARS) PER SQUARE FOOT OF SELLING AREA IN 1990

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL COMPANIES				
TOTAL	$9.00	$7.15	$10.57	10720
BOTTOM AVERAGE WEEKLY SALES	7.15	6.12	8.11	3583
MIDDLE RANGE AVERAGE WEEKLY SALES	8.21	8.21	10.00	3921
TOP AVERAGE WEEKLY SALES	10.57	10.57	12.95	3216
1 STORE OPERATORS				
TOTAL	9.61	6.77	11.76	86
BOTTOM AVERAGE WEEKLY SALES	7.34	5.92	9.71	52
MIDDLE RANGE AVERAGE WEEKLY SALES	10.61	9.53	13.99	24
TOP AVERAGE WEEKLY SALES	15.97	11.64	25.30	10
2 - 10 STORE COMPANIES				
TOTAL	7.94	5.77	10.97	319
BOTTOM AVERAGE WEEKLY SALES	6.79	4.62	8.25	143
MIDDLE RANGE AVERAGE WEEKLY SALES	8.70	7.21	10.00	108
TOP AVERAGE WEEKLY SALES	11.32	8.32	13.59	68
11 - 49 STORE COMPANIES				
TOTAL	7.30	5.92	10.92	442
BOTTOM AVERAGE WEEKLY SALES	5.92	5.46	6.50	153
MIDDLE RANGE AVERAGE WEEKLY SALES	7.30	6.17	8.19	153
TOP AVERAGE WEEKLY SALES	12.49	10.92	15.72	136
50 + STORE COMPANIES				
TOTAL	9.24	7.15	10.57	9873
BOTTOM AVERAGE WEEKLY SALES	7.15	6.12	8.11	3235
MIDDLE RANGE AVERAGE WEEKLY SALES	8.21	8.21	10.00	3636
TOP AVERAGE WEEKLY SALES	10.57	10.57	12.49	3002

NOTE: BOTTOM STORES ARE THE 25 PERCENT WITH THE LOWEST AVERAGE WEEKLY SALES
TOP STORES INCLUDE THE 25 PERCENT WITH THE HIGHEST AVERAGE WEEKLY SALES

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 11D
MEDIAN AVERAGE WEEKLY SALES (IN DOLLARS) PER SQUARE FOOT OF SELLING AREA IN 1990

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL COMPANIES				
TOTAL	$9.00	$7.15	$10.57	10720
BOTTOM SALES PER LABOR HOUR	8.12	7.15	10.57	3306
MIDDLE RANGE SALES PER LABOR HOUR	9.33	6.21	10.36	4212
TOP SALES PER LABOR HOUR	8.21	8.21	12.24	2792
1 STORE OPERATORS				
TOTAL	9.41	6.77	11.76	86
BOTTOM SALES PER LABOR HOUR	8.15	5.99	10.70	47
MIDDLE RANGE SALES PER LABOR HOUR	9.87	8.09	12.72	28
TOP SALES PER LABOR HOUR	15.95	8.14	15.97	5
2 - 10 STORE COMPANIES				
TOTAL	7.94	5.77	10.97	319
BOTTOM SALES PER LABOR HOUR	7.00	4.62	10.00	143
MIDDLE RANGE SALES PER LABOR HOUR	8.55	7.21	11.29	94
TOP SALES PER LABOR HOUR	10.93	5.77	13.80	69
11 - 49 STORE COMPANIES				
TOTAL	7.30	5.92	10.92	442
BOTTOM SALES PER LABOR HOUR	8.08	6.50	9.92	182
MIDDLE RANGE SALES PER LABOR HOUR	6.00	5.35	7.30	113
TOP SALES PER LABOR HOUR	10.92	6.17	15.72	77
50 + STORE COMPANIES				
TOTAL	9.24	7.15	10.57	9873
BOTTOM SALES PER LABOR HOUR	8.12	7.15	10.57	2934
MIDDLE RANGE SALES PER LABOR HOUR	10.05	6.21	10.36	3977
TOP SALES PER LABOR HOUR	8.21	8.21	10.94	2641

NOTE: BOTTOM STORES ARE THE 25 PERCENT WITH THE LOWEST AVERAGE WEEKLY SALES (IN DOLLARS) PER SQUARE FOOT OF SELLING AREA.

TOP STORES INCLUDE THE 25 PERCENT WITH THE HIGHEST AVERAGE WEEKLY SALES (IN DOLLARS) PER SQUARE FOOT OF SELLING AREA

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 12

MEDIAN TOTAL SIZE (IN SQUARE FEET) OF A SUPERMARKET

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL STORES	31000	29000	39893	10849
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER $10	15980	12000	20750	72
$10 - $30	22000	16000	32000	154
$31 - $100	20300	17000	28225	296
$101 - $250	30000	20100	39077	332
$251 - $500	19551	14607	34240	438
$501 - $1 BILLION	31250	31000	35000	742
$1 BILLION - $3 BILLION	28900	17500	39893	2213
OVER $3 BILLION	31000	30400	43026	6602
GEOGRAPHIC REGION OF HEADQUARTERS				
NEW ENGLAND	41900	41500	43500	343
MID ATLANTIC	30700	26000	31300	1910
EAST NORTH CENTRAL	48000	47800	48500	1660
WEST NORTH CENTRAL	43000	21404	49289	180
SOUTHEAST	30400	29000	30700	2677
WEST SOUTH CENTRAL	32800	31000	39893	392
MOUNTAIN	43000	42900	43060	544
PACIFIC	34150	30000	34500	1529
CANADA	17500	10000	30605	1614
NUMBER OF STORES				
1 STORE	21500	15000	30000	87
2 - 10 STORES	22000	17400	35000	319
11 - 49 STORES	30000	21174	35489	509
50 + STORES	31000	29000	39893	9934
INDEPENDENTS (1 - 10 STORES)	22000	16000	33500	406
CHAINS (11 + STORES)	31000	29000	39893	10443

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 13
MEDIAN OF THE AVERAGE NUMBER OF ITEMS

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL STORES	30000	17000	40000	8125
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER $10	17830	15000	20000	48
$10 - $30	19100	15000	25000	103
$31 - $100	15000	11300	22000	234
$101 - $250	13239	8500	24000	285
$251 - $500	14000	5600	24000	259
$501 - $1 BILLION	18000	8000	25000	688
$1 BILLION - $3 BILLION	21000	16000	29000	1459
OVER $3 BILLION	32000	30000	40000	5049
GEOGRAPHIC REGION OF HEADQUARTERS				
NEW ENGLAND	21000	20800	24500	142
MID ATLANTIC	21000	14000	30000	261
EAST NORTH CENTRAL	30000	27000	32500	1560
WEST NORTH CENTRAL	37500	15000	37500	107
SOUTHEAST	29000	17000	49000	2498
WEST SOUTH CENTRAL	18000	17900	34900	365
MOUNTAIN	32000	31700	32300	538
PACIFIC	40000	25000	40300	1452
CANADA	8500	8000	21000	1202
NUMBER OF STORES				
1 STORE	18750	16000	25000	66
2 - 10 STORES	18000	12000	24000	251
11 - 49 STORES	18000	12000	28000	335
50 + STORES	30000	17000	40000	7473
INDEPENDENTS (1 - 10 STORES)	18000	14500	24000	317
CHAINS (11 + STORES)	30000	17000	40000	7808

NOTE: WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 14A
AVERAGE OF THE AVERAGE PRICE PER ITEM (IN DOLLARS) OF ITEMS CARRIED IN A SUPERMARKET

		ANNUAL SALES IN MILLIONS							
	ALL STORES	UNDER $10	$10-$30	$31-$100	$101-$250	$251-$500	$501 - $1 BIL.	$1-$3 BIL.	OVER $3 BIL.
RESPONDING STORES	5099	15	52	113	250	359	276	1210	2824
PRICE OF ITEMS	$1.53	$1.53	$1.24	$1.98	$1.49	$1.45	$1.62	$1.50	$1.54

TABLE 14B
AVERAGE OF THE AVERAGE PRICE PER ITEM (IN DOLLARS) OF ITEMS CARRIED IN A SUPERMARKET

		NUMBER OF STORES OPERATED					
	ALL STORES	1 STORE	2 - 10	11 - 49	50+	INDEPENDENT (1-10 STORES)	CHAIN (11+ STORES)
RESPONDING STORES	5099	19	108	285	4687	127	4972
PRICE OF ITEMS	$1.53	$1.63	$1.49	$1.64	$1.53	$1.51	$1.53

TABLE 14C
AVERAGE OF THE AVERAGE PRICE PER ITEM (IN DOLLARS) OF ITEMS CARRIED IN A SUPERMARKET

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL STORES	NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH CENTRAL	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
RESPONDING STORES	5099	42	178	1527	84	311	273	534	1055	1095
PRICE OF ITEMS	$1.53	$1.31	$1.63	$1.44	$1.32	$1.55	$1.64	$1.88	$1.61	$1.41

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 15

MEDIAN AVERAGE SALE (IN DOLLARS) PER CUSTOMER TRANSACTION

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL STORES	$17.45	$15.95	$18.66	10602
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER $10	12.09	10.53	14.71	72
$10 - $30	15.13	13.40	17.84	151
$31 - $100	13.71	12.73	17.00	263
$101 - $250	15.14	13.41	19.71	332
$251 - $500	16.55	15.38	25.53	438
$501 - $1 BILLION	15.38	14.61	15.82	742
$1 BILLION - $3 BILLION	17.91	16.69	19.52	2063
OVER $3 BILLION	17.97	15.95	18.66	6541
GEOGRAPHIC REGION OF HEADQUARTERS				
NEW ENGLAND	24.80	24.30	25.53	343
MID ATLANTIC	18.66	17.05	18.66	1910
EAST NORTH CENTRAL	19.50	19.35	19.70	1660
WEST NORTH CENTRAL	16.55	12.73	21.56	180
SOUTHEAST	15.13	14.89	17.45	2659
WEST SOUTH CENTRAL	15.00	13.76	16.58	380
MOUNTAIN	17.90	17.80	18.15	544
PACIFIC	15.95	15.95	18.38	1523
CANADA	17.73	15.82	19.71	1403
NUMBER OF STORES				
1 STORE	14.03	11.92	17.46	87
2 - 10 STORES	15.51	13.40	18.20	310
11 - 49 STORES	16.55	13.71	24.02	482
50 + STORES	17.91	15.95	18.66	9723
INDEPENDENTS (1 - 10 STORES)	15.19	13.14	18.20	397
CHAINS (11 + STORES)	17.85	15.95	18.66	10205

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 16
MEDIAN AVERAGE NUMBER OF CHECKOUTS IN A SUPERMARKET

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL STORES	8	8	10	9359
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER $10	5	4	6	70
$10 - $30	7	5	9	153
$31 - $100	7	5	8	296
$101 - $250	8	6	11	332
$251 - $500	7	6	10	438
$501 - $1 BILLION	8	8	9	742
$1 BILLION - $3 BILLION	8	7	10	2009
OVER $3 BILLION	8	8	10	5319
GEOGRAPHIC REGION OF HEADQUARTERS				
NEW ENGLAND	15	10	16	197
MID ATLANTIC	7	7	8	627
EAST NORTH CENTRAL	8	8	8	1659
WEST NORTH CENTRAL	12	6	15	180
SOUTHEAST	10	8	10	2677
WEST SOUTH CENTRAL	8	8	11	391
MOUNTAIN	9	9	9	544
PACIFIC	8	8	8	1470
CANADA	8	6	10	1614
NUMBER OF STORES				
1 STORE	6	5	8	84
2 - 10 STORES	7	5	8	319
11 - 49 STORES	9	7	10	509
50 + STORES	8	8	10	8447
INDEPENDENTS (1 - 10 STORES)	7	5	8	403
CHAINS (11 + STORES)	8	8	10	8956

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 17
MEDIAN AVERAGE WEEKLY SALES PER CHECKOUT *

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL STORES	$22740	$15369	$33067	11098
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER $10	16411	14491	20670	72
$10 - $30	22678	17251	25875	154
$31 - $100	19752	15152	27008	309
$101 - $250	21809	17625	23754	332
$251 - $500	14686	13781	25887	438
$501 - $1 BILLION	19000	15369	24937	742
$1 BILLION - $3 BILLION	20717	14852	26879	2213
OVER $3 BILLION	29599	17254	35250	6838
GEOGRAPHIC REGION OF HEADQUARTERS				
NEW ENGLAND	33790	25887	33790	343
MID ATLANTIC	26879	24937	26879	1910
EAST NORTH CENTRAL	35250	34950	35700	1660
WEST NORTH CENTRAL	22385	13179	22385	180
SOUTHEAST	17254	15285	17254	2690
WEST SOUTH CENTRAL	21500	17129	31126	392
MOUNTAIN	33067	33067	33067	544
PACIFIC	29599	29350	35130	1529
CANADA	14852	14496	20330	1850
NUMBER OF STORES				
1 STORE	21599	16411	27211	87
2 - 10 STORES	22612	18857	27811	319
11 - 49 STORES	22678	17445	29611	522
50 + STORES	23754	15285	33067	10170
INDEPENDENTS (1 - 10 STORES)	22222	18029	27811	406
CHAINS (11 + STORES)	23180	15285	33067	10692

* 1990 WEEKLY SALES PER CHECKOUT WERE EXTRAPOLATED FROM THE AVERAGE WEEKLY SALES PER SUPERMARKET AND THE AVERAGE NUMBER OF CHECKOUTS.

NOTE: DATA WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 18A
PROFILE BY STORE TYPE --NUMBER OF STORES RESPONDING TO EACH ITEM

	CONVENTIONAL STORES	SUPER STORES	COMBINATION STORES	WAREHOUSE STORES
MEDIAN WEEKLY SALES	3564	1581	1014	127
MEDIAN NUMBER OF CHECKOUTS	3693	1586	935	129
MEDIAN SALES PER CUSTOMER TRANSACTION	3543	1568	953	129
MEDIAN SALES PER LABOR HOUR	3193	1359	804	123
MEDIAN WEEKLY SALES PER SQUARE FOOT OF SELLING AREA	3553	1568	1011	129
MEDIAN TOTAL SIZE IN SQUARE FEET	3718	1681	1026	132
AVERAGE RETAIL PRICE PER ITEM	1719	976	808	85
AVERAGE NUMBER OF ITEMS CARRIED	3216	1243	762	106

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 18B
PROFILE BY STORE TYPE

	CONVENTIONAL STORES	SUPER STORES	COMBINATION STORES	WAREHOUSE STORES
MEDIAN WEEKLY SALES	$138000	$290000	$275000	$308600
MEDIAN NUMBER OF CHECKOUTS	7	10	10	12
MEDIAN SALES PER CUSTOMER TRANSACTION	$16.35	$18.59	$16.74	$25.77
MEDIAN SALES PER LABOR HOUR	$99.85	$108.32	$99.08	$138.75
MEDIAN WEEKLY SALES PER SQUARE FOOT OF SELLING AREA	$8.84	$11.25	$9.67	$10.92
MEDIAN TOTAL SIZE IN SQUARE FEET	23175	39850	43900	43291
AVERAGE RETAIL PRICE PER ITEM	$1.45	$1.64	$1.72	$1.50
MEDIAN OF THE AVERAGE NUMBER OF ITEMS CARRIED	17000	26000	53000	10000

NOTE: EACH COLUMN IS INDIVIDUALLY WEIGHTED BY STORE TYPE

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 19A
SPECIALTY/SERVICE DEPARTMENTS OFFERED BY SUPERMARKETS

		ANNUAL SALES IN MILLIONS							
	ALL STORES	UNDER $10	$10-$30	$31-$100	$101-$250	$251-$500	$501 - $1 BIL.	$1-$3 BIL.	OVER $3 BIL.
TOTAL COMPANIES RESPONDING	159	36	45	28	12	11	8	12	7
TOTAL RESPONDING STORES	9153	39	116	247	287	438	677	1964	5385
DELI OFFERING CARRY-OUT ITEMS	74.6%	79.5%	73.3%	63.6%	80.1%	57.1%	76.1%	74.8%	76.0%
PHOTO SERVICE	74.0	48.7	67.2	54.7	39.7	79.2	66.6	65.3	80.7
SCRATCH AND/OR BAKE-OFF BAKERY	72.4	64.1	66.4	52.2	70.4	53.2	57.6	74.7	76.2
GREETING CARDS	70.5	79.5	84.5	85.0	82.9	50.9	78.4	56.0	74.7
BEER	69.4	53.8	74.1	48.2	31.0	42.2	53.3	73.8	75.1
COURTESY BOOTH	56.5	61.5	69.8	51.0	79.4	53.7	65.1	57.2	54.1
POSTAGE STAMPS	56.3	76.9	70.7	61.9	43.2	41.1	71.5	48.5	58.5
FLORAL/PLANT SHOP	55.8	35.9	41.4	44.1	53.0	26.7	49.6	50.7	61.9
WINE	55.6	48.7	51.7	32.0	26.8	19.2	31.0	65.6	60.8
FRESH SEAFOOD	44.8	43.6	44.8	55.1	49.1	38.8	37.4	40.4	47.1
NUTRITIONAL SHELF TAGS	43.9	23.1	23.3	30.8	43.6	27.2	28.7	27.2	54.5
SERVICE MEAT	36.6	46.2	31.0	46.6	55.1	23.1	53.0	56.3	27.1
COSMETIC CENTER	28.8	17.9	12.1	19.8	18.5	27.4	20.7	22.3	33.8
SALAD BAR	26.9	25.6	26.7	14.2	15.7	23.3	52.7	22.6	26.7
READING CENTER	26.4	43.6	28.4	47.8	16.0	32.0	58.5	46.0	14.2
PHARMACY	25.5	2.6	25.9	6.5	17.1	21.2	17.6	39.5	23.2
VIDEO RENTAL	23.0	25.6	63.8	37.2	36.9	37.7	23.3	25.4	18.6
CASH DISPENSING MACHINES (ATMs)	20.7	7.7	9.5	13.4	15.0	5.5	29.7	20.8	21.7
UNPACKAGED OR BULK FOODS	18.5	25.6	34.5	32.0	34.5	22.6	21.6	28.2	12.3
LIQUOR	13.9	20.5	19.8	11.7	5.9	7.3	10.0	16.5	14.3
LUNCH COUNTER/SNACK BAR	8.7	15.4	25.9	18.2	10.1	12.1	16.0	16.7	3.7
CATERING	7.0	38.5	33.6	18.2	40.1	8.0	7.8	17.2	.1
IN-STORE BANKS	6.0	7.7	4.3	5.7	.7	11.0	17.0	1.7	6.1
HOME DELIVERY SERVICE	5.9	10.3	15.5	20.6	12.9	7.8	10.2	11.0	2.1
RESTAURANT	5.1	2.6	6.0	6.5	.7	1.4	1.3	.9	7.6

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 19B
SPECIALTY/SERVICE DEPARTMENTS OFFERED BY SUPERMARKETS

		NUMBER OF STORES OPERATED					
	ALL STORES	1 STORE	2 - 10	11 - 49	50+	INDEPENDENT (1-10 STORES)	CHAIN (11+ STORES)
TOTAL COMPANIES RESPONDING	159	51	52	25	31	103	56
TOTAL RESPONDING STORES	9153	51	229	470	8403	280	8873
DELI OFFERING CARRY-OUT ITEMS	74.6%	86.3%	74.2%	67.7%	75.0%	76.4%	74.6%
PHOTO SERVICE	74.0	58.8	50.7	75.3	74.6	52.1	74.7
SCRATCH AND/OR BAKE-OFF BAKERY	72.4	76.5	64.2	62.1	73.2	66.4	72.6
GREETING CARDS	70.5	84.3	84.7	86.6	69.1	84.6	70.0
BEER	69.4	66.7	69.0	51.9	70.4	68.6	69.4
COURTESY BOOTH	56.5	72.5	68.1	57.2	56.1	68.9	56.1
POSTAGE STAMPS	56.3	78.4	65.9	73.2	55.0	68.2	55.9
FLORAL/PLANT SHOP	55.8	45.1	46.7	48.3	56.5	46.4	56.1
WINE	55.6	54.9	55.0	34.9	56.8	55.0	55.6
FRESH SEAFOOD	44.8	54.9	55.9	58.9	43.6	55.7	44.4
NUTRITIONAL SHELF TAGS	43.9	33.3	37.6	24.0	45.2	36.8	44.1
SERVICE MEAT	36.6	41.2	44.5	44.9	35.9	43.9	36.4
COSMETIC CENTER	28.8	25.5	17.5	28.9	29.1	18.9	29.1
SALAD BAR	26.9	33.3	23.1	23.4	27.1	25.0	26.9
READING CENTER	26.4	41.2	37.1	33.0	25.7	37.9	26.1
PHARMACY	25.5	9.8	14.8	31.5	25.6	13.9	25.9
VIDEO RENTAL	23.0	37.3	46.7	41.7	21.2	45.0	22.3
CASH DISPENSING MACHINES (ATMs)	20.7	15.7	19.2	10.4	21.3	18.6	20.8
UNPACKAGED OR BULK FOODS	18.5	31.4	34.9	23.4	17.7	34.3	18.0
LIQUOR	13.9	19.6	19.2	11.7	13.8	19.3	13.7
LUNCH COUNTER/SNACK BAR	8.7	23.5	23.1	11.1	8.1	23.2	8.3
CATERING	7.0	43.1	26.6	20.0	5.6	29.6	6.3
IN-STORE BANKS	6.0	9.8	3.9	8.5	5.9	5.0	6.1
HOME DELIVERY SERVICE	5.9	17.6	13.1	11.1	5.4	13.9	5.7
RESTAURANT	5.1	5.9	4.8	2.6	5.2	5.0	5.1

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 19C

SPECIALTY/SERVICE DEPARTMENTS OFFERED BY SUPERMARKETS

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL STORES	NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH CENTRAL	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL COMPANIES RESPONDING	159	13	17	38	14	24	11	6	18	18
TOTAL RESPONDING STORES	9153	143	1826	1621	166	1696	389	542	1156	1614
DELI OFFERING CARRY-OUT ITEMS	74.6%	90.9%	64.9%	80.1%	75.3%	89.4%	52.7%	87.5%	77.7%	62.0%
PHOTO SERVICE	74.0	79.0	99.2	84.1	52.4	85.0	94.3	65.7	65.6	29.2
SCRATCH AND/OR BAKE-OFF BAKERY	72.4	86.0	61.9	75.3	77.7	79.8	55.0	85.1	66.5	76.0
GREETING CARDS	70.5	38.5	59.3	81.2	98.2	82.7	99.5	73.2	96.7	32.8
BEER	69.4	72.7	70.3	72.5	65.1	86.7	81.5	88.9	73.5	34.9
COURTESY BOOTH	56.5	85.3	28.3	84.5	62.7	89.9	57.3	46.1	26.0	47.3
POSTAGE STAMPS	56.3	35.0	94.2	36.6	86.1	26.4	99.0	99.1	99.0	8.2
FLORAL/PLANT SHOP	55.8	65.0	58.9	61.9	56.0	45.9	56.6	98.2	88.5	17.9
WINE	55.6	58.0	38.2	59.5	51.2	79.0	50.4	75.3	65.2	34.8
FRESH SEAFOOD	44.8	92.3	37.0	48.7	65.7	46.6	26.7	59.6	58.2	31.2
NUTRITIONAL SHELF TAGS	43.9	62.2	1.5	66.9	24.7	50.8	4.6	98.3	83.8	24.3
SERVICE MEAT	36.6	46.9	22.8	36.0	24.7	31.1	27.0	59.2	31.1	57.4
COSMETIC CENTER	28.8	6.3	8.1	30.8	5.4	81.8	34.7	27.5	19.1	4.9
SALAD BAR	26.9	59.4	31.3	16.3	27.1	17.7	18.8	44.6	55.7	14.6
READING CENTER	26.4	1.4	17.6	12.6	60.8	29.7	30.6	.7	34.5	47.3
PHARMACY	25.5	19.6	9.3	35.4	52.4	7.7	48.6	48.7	31.2	32.8
VIDEO RENTAL	23.0	51.0	13.2	35.1	70.5	10.9	38.3	65.1	22.0	10.2
CASH DISPENSING MACHINES (ATMs)	20.7	4.2	8.5	22.7	2.4	7.9	30.3	42.6	56.1	14.3
UNPACKAGED OR BULK FOODS	18.5	8.4	9.0	6.4	44.0	22.7	1.0	.9	35.9	32.8
LIQUOR	13.9	4.2	6.2	5.5	48.2	9.8	2.8	46.3	47.8	.1
LUNCH COUNTER/SNACK BAR	8.7	5.6	1.5	2.5	4.2	11.6	17.2	.7	17.9	15.0
CATERING	7.0	4.2	16.5	3.9	8.4	2.9	13.4	1.3	1.6	8.1
IN-STORE BANKS	6.0	.7	2.4	19.1	3.0	.8	12.9	.2	8.7	1.6
HOME DELIVERY SERVICE	5.9	6.3	2.6	1.8	12.7	.9	8.5	.6	8.7	17.6
RESTAURANT	5.1	.7	.1	25.7	11.4	.9	.3	-	.3	.6

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 19D
SPECIALTY/SERVICE DEPARTMENTS OFFERED BY SUPERMARKETS

	ALL STORES	TOP IDENTICAL STORE SALES	TOP SALES PER SQUARE FOOT	TOP WEEKLY SALES	TOP SALES PER LABOR HOUR	BOTTOM SALES PER LABOR HOUR
TOTAL COMPANIES RESPONDING	159	36	43	34	21	71
TOTAL RESPONDING STORES	9153	675	842	2716	2253	3277
DELI OFFERING CARRY-OUT ITEMS	74.6%	62.8%	84.7%	81.5%	65.0%	80.7%
PHOTO SERVICE	74.0	64.9	91.7	79.7	92.0	74.1
SCRATCH AND/OR BAKE-OFF BAKERY	72.4	69.9	75.5	77.1	61.6	78.5
GREETING CARDS	70.5	59.4	78.3	77.7	64.7	78.9
BEER	69.4	40.1	73.8	75.8	70.1	73.6
COURTESY BOOTH	56.5	62.7	63.1	69.4	26.0	83.3
POSTAGE STAMPS	56.3	47.9	84.3	59.8	87.7	24.2
FLORAL/PLANT SHOP	55.8	36.9	84.8	78.3	60.9	46.5
WINE	55.6	38.4	69.6	64.7	46.6	63.6
FRESH SEAFOOD	44.8	48.3	76.2	61.2	40.7	43.9
NUTRITIONAL SHELF TAGS	43.9	38.2	45.1	69.1	19.1	44.6
SERVICE MEAT	36.6	54.4	64.0	49.9	28.2	33.6
COSMETIC CENTER	28.8	24.1	46.9	35.6	18.6	55.5
SALAD BAR	26.9	27.0	42.9	30.7	26.5	12.8
READING CENTER	26.4	28.0	38.7	18.9	25.0	14.2
PHARMACY	25.5	21.9	28.7	39.7	13.7	23.0
VIDEO RENTAL	23.0	36.6	30.6	35.8	11.9	22.0
CASH DISPENSING MACHINES (ATMs)	20.7	19.3	22.3	26.8	14.9	12.3
UNPACKAGED OR BULK FOODS	18.5	21.5	37.4	12.6	19.7	15.3
LIQUOR	13.9	15.0	28.4	20.5	16.5	5.2
LUNCH COUNTER/SNACK BAR	8.7	9.2	44.2	14.4	8.5	5.8
CATERING	7.0	8.3	6.9	2.2	16.7	3.3
IN-STORE BANKS	6.0	10.5	6.4	11.5	2.7	8.1
HOME DELIVERY SERVICE	5.9	11.1	6.5	2.7	.3	2.4
RESTAURANT	5.1	.9	.4	16.0	.4	12.9

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 20

MEDIAN PERCENTAGE OF ANNUAL SALES BUDGETED TO ADVERTSING - ALL COMPANIES

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL COMPANIES	1.04%	.84%	1.37%	156
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER $10	1.22	.99	1.55	36
$10 - $30	1.04	.80	1.30	42
$31 - $100	1.00	.81	1.23	28
$101 - $250 -	1.02	.75	1.50	13
$251 - $500	1.05	.84	1.12	11
$501 - $1 BILLION	1.02	1.00	1.21	8
$1 BILLION - $3 BILLION	.96	.72	1.05	12
OVER $3 BILLION	1.08	.64	1.22	6
GEOGRAPHIC REGION OF HEADQUARTERS				
NEW ENGLAND	1.00	.90	1.24	13
MID ATLANTIC	1.04	.84	1.42	16
EAST NORTH CENTRAL	1.00	.85	1.40	37
WEST NORTH CENTRAL	1.22	.98	1.80	14
SOUTHEAST	.95	.70	1.20	23
WEST SOUTH CENTRAL	1.07	1.00	1.91	11
MOUNTAIN	.80	.32	.80	5
PACIFIC	.98	.70	1.15	18
CANADA	1.37	1.12	1.75	19
NUMBER OF STORES				
1 STORE	1.14	.90	1.50	51
2 - 10 STORES	1.00	.76	1.38	48
11 - 49 STORES	1.00	.84	1.20	27
50 + STORES	1.05	.84	1.29	30
INDEPENDENTS (1 - 10 STORES)	1.07	.83	1.40	99
CHAINS (11 + STORES)	1.03	.84	1.22	57

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 21A
PERCENTAGE OF FIRMS THAT INCLUDE CO-OP DOLLARS IN THEIR BUDGETS

		ANNUAL SALES IN MILLIONS							
	ALL COMPANIES	UNDER $10	$10-$30	$31-$100	$101-$250	$251-$500	$501 - $1 BIL.	$1-$3 BIL.	OVER $3 BIL.
TOTAL COMPANIES	154	35	42	27	13	11	8	12	6
COMPANIES INCLUDING CO-OP DOLLARS	37.0%	31.4%	40.5%	37.0%	53.8%	27.3%	37.5%	33.3%	33.3%
COMPANIES NOT INCLUDING CO-OP DOLLARS	63.0	68.6	59.5	63.0	46.2	72.7	62.5	66.7	66.7

TABLE 21B
PERCENTAGE OF FIRMS THAT INCLUDE CO-OP DOLLARS IN THEIR BUDGETS

		NUMBER OF STORES OPERATED					
	ALL COMPANIES	1 STORE	2 - 10	11 - 49	50+	INDEPENDENT (1-10 STORES)	CHAIN (11+ STORES)
TOTAL COMPANIES	154	50	47	27	30	97	57
COMPANIES INCLUDING CO-OP DOLLARS	37.0%	38.0%	29.8%	44.4%	40.0%	34.0%	42.1%
COMPANIES NOT INCLUDING CO-OP DOLLARS	63.0	62.0	70.2	55.6	60.0	66.0	57.9

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 22

MEDIAN PERCENTAGE OF ADVERTISING EXPENSES WHICH ARE CO-OP

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL COMPANIES	9.0%	.4%	30.0%	41
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER $10	2.0	.4	5.0	5
$10 - $30	3.0	.2	15.0	14
$31 - $100	22.5	.4	38.7	8
$101 - $250	19.1	5.2	43.8	4
$251 - $500				2
$501 - $1 BILLION				3
$1 BILLION - $3 BILLION				3
OVER $3 BILLION				2
GEOGRAPHIC REGION OF HEADQUARTERS				
NEW ENGLAND				2
MID ATLANTIC	20.0	5.2	36.3	4
EAST NORTH CENTRAL	12.5	1.2	32.8	8
WEST NORTH CENTRAL	2.9	.6	12.5	4
SOUTHEAST	28.5	5.0	30.0	5
WEST SOUTH CENTRAL	9.0	.8	48.0	7
MOUNTAIN				2
PACIFIC	.8	.4	10.0	6
CANADA				3
NUMBER OF STORES				
1 STORE	3.5	.4	10.0	10
2 - 10 STORES	.6	.3	33.7	12
11 - 49 STORES	12.5	2.7	29.1	8
50 + STORES	28.5	.8	48.0	11
INDEPENDENTS (1 - 10 STORES)	1.5	.3	15.0	22
CHAINS (11 + STORES)	15.0	.8	40.0	19

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 23A
AVERAGE PERCENTAGE OF ADVERTISING DOLLARS SPENT ON THE FOLLOWING METHODS

		ANNUAL SALES IN MILLIONS							
	ALL COMPANIES	UNDER $10	$10-$30	$31-$100	$101-$250	$251-$500	$501 - $1 BIL.	$1-$3 BIL.	OVER $3 BIL.
TOTAL	143	32	41	25	10	11	7	11	6
NEWSPAPER	49.9%	52.2%	58.1%	52.6%	41.9%	37.2%	35.4%	38.1%	46.8%
TARGETED MAILER/FLYER	27.0	32.2	20.0	28.6	30.2	34.8	31.4	28.2	14.3
RADIO	8.2	8.6	8.7	7.5	6.3	8.4	5.6	7.5	11.8
TELEVISION	6.0	4.8	2.6	5.6	5.2	9.9	10.2	11.6	18.1
OTHER	4.2	1.3	2.4	2.3	13.0	6.4	7.0	12.5	3.8
IN-STORE COUPONS	3.7	.9	7.1	2.4	2.1	2.8	9.8	1.6	1.7
BILLBOARDS	.9	0	1.2	1.1	1.3	.6	.7	.6	3.5

TABLE 23B
AVERAGE PERCENTAGE OF ADVERTISING DOLLARS SPENT ON THE FOLLOWING METHODS

		NUMBER OF STORES OPERATED					
	ALL COMPANIES	1 STORE	2 - 10	11 - 49	50+	INDEPENDENT (1-10 STORES)	CHAIN (11+ STORES)
TOTAL	143	47	45	23	28	92	51
NEWSPAPER	49.9%	54.2%	54.3%	46.9%	38.2%	54.2%	42.1%
TARGETED MAILER/FLYER	27.0	24.7	28.2	27.5	28.7	26.4	28.1
RADIO	8.2	10.6	6.8	6.6	7.6	8.7	7.2
TELEVISION	6.0	3.8	3.5	8.7	11.7	3.7	10.4
OTHER	4.2	1.6	2.7	5.3	10.2	2.1	8.0
IN-STORE COUPONS	3.7	4.5	3.4	4.1	2.4	4.0	3.1
BILLBOARDS	.9	.5	1.1	.9	1.2	.8	1.1

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 23C

AVERAGE PERCENTAGE OF ADVERTISING DOLLARS SPENT ON THE FOLLOWING METHODS

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL COMPANIES	NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH CENTRAL	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	143	12	13	31	12	22	11	6	18	18
NEWSPAPER	49.9%	52.8%	40.1%	56.6%	56.9%	49.1%	57.7%	66.2%	56.7%	23.0%
TARGETED MAILER/FLYER	27.0	35.3	35.6	14.8	12.8	32.7	22.9	3.0	25.1	51.3
RADIO	8.2	5.5	5.4	12.4	7.4	6.1	3.1	22.0	7.7	6.7
TELEVISION	6.0	2.9	3.0	5.4	11.3	9.0	4.3	4.8	5.1	6.8
OTHER	4.2	1.9	8.7	5.4	1.9	1.6	5.4	2.0	1.5	8.1
IN-STORE COUPONS	3.7	1.6	7.0	4.2	8.0	.8	5.8	2.0	2.6	2.7
BILLBOARDS	.9	0	.1	1.1	1.9	.8	.7	0	1.3	1.4

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 24
PROFILE OF RESPONDENTS

	TOTAL
ALL STORES	291
BY STORE FORMAT	
CONVENTIONAL STORES	192
SUPER STORES	63
COMBINATION STORES	19
WAREHOUSE STORES	17
BY TOTAL AREA OF STORES	
UNDER 15,000 SQ. FT.	36
15,000 TO 25,000 SQ. FT.	101
25,001 TO 35,000 SQ. FT.	62
35,001 TO 45,000 SQ. FT.	43
OVER 45,000 SQ. FT.	43
BY SERVICE LEVELS	
LOW SERVICE LEVELS - 3 OR FEWER CHECKED	60
MIDDLE SERVICE LEVELS - 4 TO 6 CHECKED	128
HIGH SERVICE LEVELS - 7 OR MORE CHECKED	103
BY GEOGRAPHIC REGION	
NEW ENGLAND	18
MIDDLE ATLANTIC	30
EAST NORTH CENTRAL	71
WEST NORTH CENTRAL	22
SOUTHEAST	37
WEST SOUTH CENTRAL	28
MOUNTAIN	9
PACIFIC	37
CANADA	39

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

NOTE: This section of *Speaks* contains data from a sample of 291 individual stores. The intent is to analyze the relationships between various factors at the store level rather than provide overall industry results. Those desiring industry benchmarks should see the previous section "companywide retail operations," pages 1-47 of this book and page 4-7 of the *Speaks* report.

TABLE 25A

MEDIAN WEEKLY TRANSACTIONS PER SQUARE FOOT OF SELLING AREA

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL STORES	.54	.44	.71	256
BY STORE FORMAT				
CONVENTIONAL STORES	.58	.46	.78	171
SUPER STORES	.52	.41	.64	57
COMBINATION STORES	.51	.44	.59	16
WAREHOUSE STORES	.48	.38	.55	12
BY TOTAL AREA OF STORES				
UNDER 15,000 SQ. FT.	.76	.55	1.18	34
15,000 TO 25,000 SQ. FT.	.53	.44	.70	94
25,001 TO 35,000 SQ. FT.	.58	.50	.71	51
35,001 TO 45,000 SQ. FT.	.53	.44	.63	36
OVER 45,000 SQ. FT.	.44	.38	.56	36
BY SERVICE LEVELS				
LOW SERVICE LEVELS - 3 OR FEWER CHECKED	.55	.39	.72	58
MIDDLE SERVICE LEVELS - 4 TO 6 CHECKED	.53	.45	.71	115
HIGH SERVICE LEVELS - 7 OR MORE CHECKED	.54	.44	.71	83
BY ANNUAL SALES GROWTH				
STORES IN THE TOP 25% OF ANNUAL SALES GROWTH	.53	.42	.70	58
STORES IN THE BOTTOM 25% OF ANNUAL SALES GROWTH	.52	.41	.69	66
BY SALES PER LABOR HOUR				
UNDER $75.00	.51	.39	.64	43
$75.00 TO $95.00	.57	.45	.73	96
OVER $95.00	.54	.44	.71	86
BY WEEKLY SALES PER SQUARE FOOT OF SELLING AREA				
UNDER $6.50	.41	.35	.48	47
$6.50 TO $9.50	.51	.43	.62	82
OVER $9.50	.64	.52	.84	123

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 25B
MEDIAN WEEKLY TRANSACTIONS PER SQUARE FOOT OF SELLING AREA

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL STORES	.54	.44	.71	256
BY CUSTOMER TRANSACTIONS PER LABOR HOUR				
UNDER 4.5	.50	.42	.55	53
4.5 TO 5.5	.52	.42	.63	61
5.6 TO 6.5	.54	.41	.70	56
OVER 6.5	.66	.51	.85	86
BY AVERAGE WEEKLY SALES				
UNDER $100,000	.50	.43	.69	54
$100,000 TO $149,999	.53	.43	.71	54
$150,000 TO $200,000	.51	.41	.60	30
OVER $200,000	.58	.47	.74	114
BY GEOGRAPHIC REGION				
NEW ENGLAND	.69	.51	.95	18
MIDDLE ATLANTIC	.57	.48	.84	28
EAST NORTH CENTRAL	.53	.45	.65	65
WEST NORTH CENTRAL	.56	.41	.70	20
SOUTHEAST	.50	.43	.67	28
WEST SOUTH CENTRAL	.39	.34	.53	25
MOUNTAIN	.71	.67	.86	9
PACIFIC	.56	.45	.85	33
CANADA	.55	.44	.72	30

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 26A
MEDIAN WEEKLY SALES PER SQUARE FOOT OF SELLING AREA

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL STORES	$9.42	$7.21	$12.28	279
BY STORE FORMAT				
CONVENTIONAL STORES	8.86	6.73	12.17	182
SUPER STORES	10.41	7.76	12.27	62
COMBINATION STORES	9.63	6.99	12.04	18
WAREHOUSE STORES	10.80	7.53	15.42	17
BY TOTAL AREA OF STORES				
UNDER 15,000 SQ. FT.	8.65	7.21	13.24	35
15,000 TO 25,000 SQ. FT.	8.41	6.41	10.10	99
25,001 TO 35,000 SQ. FT.	10.54	7.65	12.84	59
35,001 TO 45,000 SQ. FT.	11.40	9.41	13.50	41
OVER 45,000 SQ. FT.	10.27	7.66	12.91	40
BY SERVICE LEVELS				
LOW SERVICE LEVELS - 3 OR FEWER CHECKED	7.55	5.46	10.76	57
MIDDLE SERVICE LEVELS - 4 TO 6 CHECKED	9.32	7.50	12.00	126
HIGH SERVICE LEVELS - 7 OR MORE CHECKED	10.45	7.86	13.40	96
BY ANNUAL SALES GROWTH				
STORES IN THE TOP 25% OF ANNUAL SALES GROWTH	9.68	7.02	12.14	68
STORES IN THE BOTTOM 25% OF ANNUAL SALES GROWTH	8.54	6.57	10.85	69
BY SALES PER LABOR HOUR				
UNDER $75.00	6.97	5.44	9.62	48
$75.00 TO $95.00	9.15	7.23	11.97	100
OVER $95.00	10.76	8.29	14.16	95
BY WEEKLY TRANSACTIONS PER SQ. FT. OF SELLING AREA				
UNDER 0.50	7.18	5.32	9.09	90
0.50 TO 0.80	10.39	8.24	12.84	119
OVER 0.80	13.24	9.62	17.69	43

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 26B
MEDIAN WEEKLY SALES PER SQUARE FOOT OF SELLING AREA

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL STORES	$9.42	$7.21	$12.28	279
BY CUSTOMER TRANSACTIONS PER LABOR HOUR				
UNDER 4.5	11.52	8.16	14.72	52
4.5 TO 5.5	9.62	7.61	12.39	61
5.6 TO 6.5	8.98	5.79	10.83	56
OVER 6.5	8.86	6.99	12.17	110
BY AVERAGE WEEKLY SALES				
UNDER $100,000	6.47	5.26	7.93	56
$100,000 TO $149,999	8.32	6.87	9.40	56
$150,000 TO $200,000	8.79	6.99	11.65	35
OVER $200,000	11.82	9.77	14.60	132
BY GEOGRAPHIC REGION				
NEW ENGLAND	10.30	8.46	14.56	18
MIDDLE ATLANTIC	13.05	9.52	17.62	30
EAST NORTH CENTRAL	8.86	6.73	10.80	67
WEST NORTH CENTRAL	8.15	5.96	10.40	22
SOUTHEAST	8.24	6.73	12.04	34
WEST SOUTH CENTRAL	5.79	4.92	8.86	28
MOUNTAIN	13.24	9.24	13.74	9
PACIFIC	10.01	6.63	12.98	36
CANADA	10.57	8.79	13.38	35

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 27A
MEDIAN SALES PER LABOR HOUR

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL STORES	$89.43	$78.67	$106.01	246
BY STORE FORMAT				
CONVENTIONAL STORES	85.72	76.26	98.29	169
SUPER STORES	93.13	81.80	116.28	50
COMBINATION STORES	99.95	92.01	125.34	15
WAREHOUSE STORES	117.50	109.54	152.13	12
BY TOTAL AREA OF STORES				
UNDER 15,000 SQ. FT.	80.45	74.20	92.31	29
15,000 TO 25,000 SQ. FT.	86.05	74.67	99.08	92
25,001 TO 35,000 SQ. FT.	89.09	78.08	100.14	51
35,001 TO 45,000 SQ. FT.	96.22	87.46	115.26	40
OVER 45,000 SQ. FT.	99.54	89.16	125.54	29
BY SERVICE LEVELS				
LOW SERVICE LEVELS - 3 OR FEWER CHECKED	85.74	78.65	103.87	50
MIDDLE SERVICE LEVELS - 4 TO 6 CHECKED	87.75	78.08	100.14	114
HIGH SERVICE LEVELS - 7 OR MORE CHECKED	93.06	80.35	116.28	82
BY ANNUAL SALES GROWTH				
STORES IN THE TOP 25% OF ANNUAL SALES GROWTH	92.20	78.67	109.20	59
STORES IN THE BOTTOM 25% OF ANNUAL SALES GROWTH	89.11	79.25	103.87	63
BY WEEKLY TRANSACTIONS PER SQ. FT. OF SELLING AREA				
UNDER 0.50	90.24	76.66	107.92	80
0.50 TO 0.80	90.22	79.53	107.70	107
OVER 0.80	87.29	79.25	100.00	38
BY WEEKLY SALES PER SQUARE FOOT OF SELLING AREA				
UNDER $6.50	79.70	67.66	87.61	46
$6.50 TO $9.50	90.37	77.39	103.25	76
OVER $9.50	96.04	82.66	115.25	121

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 27B
MEDIAN SALES PER LABOR HOUR

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL STORES	$89.43	$78.67	$106.01	246
BY CUSTOMER TRANSACTIONS PER LABOR HOUR				
UNDER 4.5	81.62	70.92	98.77	54
4.5 TO 5.5	91.51	79.04	102.36	62
5.6 TO 6.5	89.12	78.92	102.28	56
OVER 6.5	93.97	82.09	114.24	74
BY AVERAGE WEEKLY SALES				
UNDER $100,000	77.51	67.66	86.39	49
$100,000 TO $149,999	86.05	78.27	99.87	52
$150,000 TO $200,000	89.09	80.73	96.78	31
OVER $200,000	97.60	84.28	117.88	114
BY GEOGRAPHIC REGION				
NEW ENGLAND	90.51	82.66	102.60	15
MIDDLE ATLANTIC	92.08	78.46	113.66	27
EAST NORTH CENTRAL	80.36	70.61	91.51	60
WEST NORTH CENTRAL	88.51	80.13	97.96	22
SOUTHEAST	86.47	77.51	99.79	30
WEST SOUTH CENTRAL	83.29	78.65	91.57	23
MOUNTAIN	115.25	98.36	120.19	7
PACIFIC	102.38	88.50	124.19	36
CANADA	105.97	90.58	122.55	26

Continued

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 28A
MEDIAN CUSTOMER TRANSACTIONS PER LABOR HOUR

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL STORES	5.50	4.50	6.50	231
BY STORE FORMAT				
CONVENTIONAL STORES	5.70	4.70	6.90	159
SUPER STORES	4.95	3.95	5.90	48
COMBINATION STORES	5.10	4.40	6.50	13
WAREHOUSE STORES	4.60	4.50	6.20	11
BY TOTAL AREA OF STORES				
UNDER 15,000 SQ. FT.	6.50	5.50	8.00	29
15,000 TO 25,000 SQ. FT.	5.90	4.80	7.00	89
25,001 TO 35,000 SQ. FT.	5.25	4.65	6.00	44
35,001 TO 45,000 SQ. FT.	4.80	3.80	6.20	35
OVER 45,000 SQ. FT.	4.50	3.90	5.50	29
BY SERVICE LEVELS				
LOW SERVICE LEVELS - 3 OR FEWER CHECKED	6.05	5.00	6.90	50
MIDDLE SERVICE LEVELS - 4 TO 6 CHECKED	5.45	4.50	6.50	110
HIGH SERVICE LEVELS - 7 OR MORE CHECKED	5.30	4.30	6.30	71
BY ANNUAL SALES GROWTH				
STORES IN THE TOP 25% OF ANNUAL SALES GROWTH	5.40	4.55	6.35	56
STORES IN THE BOTTOM 25% OF ANNUAL SALES GROWTH	5.75	4.45	6.85	60
BY SALES PER LABOR HOUR				
UNDER $75.00	4.70	4.10	6.00	43
$75.00 TO $95.00	5.50	4.50	6.40	99
OVER $95.00	5.75	4.90	6.90	86
BY WEEKLY TRANSACTIONS PER SQ. FT. OF SELLING AREA				
UNDER 0.50	5.05	4.30	5.95	80
0.50 TO 0.80	5.50	4.60	6.60	108
OVER 0.80	6.45	5.50	8.30	38
BY WEEKLY SALES PER SQUARE FOOT OF SELLING AREA				
UNDER $6.50	6.20	5.50	6.70	42
$6.50 TO $9.50	5.55	4.60	6.80	72
OVER $9.50	5.10	4.00	6.30	111

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 28B
MEDIAN CUSTOMER TRANSACTIONS PER LABOR HOUR

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL STORES	5.50	4.50	6.50	231
BY AVERAGE WEEKLY SALES				
UNDER $100,000	6.20	5.30	7.30	47
$100,000 TO $149,999	6.00	5.30	7.00	50
$150,000 TO $200,000	5.45	4.40	6.30	26
OVER $200,000	4.90	3.90	5.80	105
BY GEOGRAPHIC REGION				
NEW ENGLAND	5.60	4.80	7.10	15
MIDDLE ATLANTIC	4.40	3.50	5.40	25
EAST NORTH CENTRAL	4.95	4.30	5.80	58
WEST NORTH CENTRAL	5.95	4.95	7.00	20
SOUTHEAST	5.95	4.80	7.00	26
WEST SOUTH CENTRAL	5.90	4.70	6.30	23
MOUNTAIN	6.10	5.80	6.90	7
PACIFIC	6.20	5.40	7.50	33
CANADA	5.55	4.35	7.50	24

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 29A
MEDIAN WEEKLY PAYROLL AS A PERCENTAGE OF WEEKLY SALES

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL STORES	9.2%	7.9%	10.5%	271
BY STORE FORMAT				
CONVENTIONAL STORES	9.4	8.2	10.7	180
SUPER STORES	8.3	7.5	9.9	59
COMBINATION STORES	9.3	8.5	10.8	18
WAREHOUSE STORES	7.6	6.4	7.9	14
BY TOTAL AREA OF STORES				
UNDER 15,000 SQ. FT.	8.7	7.8	10.7	33
15,000 TO 25,000 SQ. FT.	9.4	8.4	10.8	95
25,001 TO 35,000 SQ. FT.	9.3	7.8	10.5	58
35,001 TO 45,000 SQ. FT.	9.4	8.0	10.3	43
OVER 45,000 SQ. FT.	8.0	6.8	9.7	37
BY SERVICE LEVELS				
LOW SERVICE LEVELS - 3 OR FEWER CHECKED	9.0	7.8	10.4	55
MIDDLE SERVICE LEVELS - 4 TO 6 CHECKED	9.3	8.1	10.6	120
HIGH SERVICE LEVELS - 7 OR MORE CHECKED	9.1	7.6	10.3	96
BY ANNUAL SALES GROWTH				
STORES IN THE TOP 25% OF ANNUAL SALES GROWTH	8.7	7.8	10.5	64
STORES IN THE BOTTOM 25% OF ANNUAL SALES GROWTH	9.8	8.2	10.8	66
BY SALES PER LABOR HOUR				
UNDER $75.00	9.9	8.4	11.1	48
$75.00 TO $95.00	9.1	7.6	10.2	102
OVER $95.00	8.7	7.5	10.3	93
BY WEEKLY TRANSACTIONS PER SQ. FT. OF SELLING AREA				
UNDER 0.50	9.0	7.5	10.1	89
0.50 TO 0.80	9.1	7.9	10.5	116
OVER 0.80	9.8	8.6	11.5	42
BY WEEKLY SALES PER SQUARE FOOT OF SELLING AREA				
UNDER $6.50	9.0	7.8	10.2	50
$6.50 TO $9.50	9.2	8.0	10.5	85
OVER $9.50	9.2	7.8	10.6	133

Continued

TABLE 29A

MEDIAN WEEKLY PAYROLL AS A PERCENTAGE OF WEEKLY SALES

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
BY CUSTOMER TRANSACTIONS PER LABOR HOUR				
UNDER 4.5	9.8	8.4	10.8	54
4.5 TO 5.5	8.8	7.6	10.2	62
5.6 TO 6.5	8.3	7.5	9.3	55
OVER 6.5	9.7	8.1	10.9	100

TABLE 29B

MEDIAN WEEKLY PAYROLL AS A PERCENTAGE OF WEEKLY SALES

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL STORES	9.2%	7.9%	10.5%	271
BY AVERAGE WEEKLY SALES				
UNDER $100,000	9.7	8.1	10.4	53
$100,000 TO $149,999	9.3	7.8	10.7	54
$150,000 TO $200,000	9.2	8.5	11.4	35
OVER $200,000	8.9	7.8	10.3	129
BY GEOGRAPHIC REGION				
NEW ENGLAND	10.5	9.0	12.7	16
MIDDLE ATLANTIC	9.2	8.4	10.3	30
EAST NORTH CENTRAL	8.7	7.8	10.3	69
WEST NORTH CENTRAL	8.2	7.4	9.9	22
SOUTHEAST	9.4	8.2	10.8	33
WEST-SOUTH CENTRAL	8.2	7.4	9.7	28
MOUNTAIN	9.1	8.5	11.4	9
PACIFIC	9.8	8.2	11.8	35
CANADA	9.4	8.2	10.5	29

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 30A
MEDIAN PAYROLL PER LABOR HOUR

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL STORES	$8.16	$6.76	$10.00	247
BY STORE FORMAT				
CONVENTIONAL STORES	7.96	6.67	9.90	169
SUPER STORES	7.86	6.65	9.70	50
COMBINATION STORES	8.72	7.83	12.43	16
WAREHOUSE STORES	9.72	7.81	11.22	12
BY TOTAL AREA OF STORES				
UNDER 15,000 SQ. FT.	7.43	5.91	9.67	30
15,000 TO 25,000 SQ. FT.	7.90	6.67	10.12	91
25,001 TO 35,000 SQ. FT.	8.11	6.35	9.57	51
35,001 TO 45,000 SQ. FT.	8.68	7.49	11.02	40
OVER 45,000 SQ. FT.	7.64	7.20	9.66	30
BY SERVICE LEVELS				
LOW SERVICE LEVELS - 3 OR FEWER CHECKED	7.50	6.09	9.48	49
MIDDLE SERVICE LEVELS - 4 TO 6 CHECKED	8.43	6.84	9.85	114
HIGH SERVICE LEVELS - 7 OR MORE CHECKED	8.00	6.95	10.60	84
BY ANNUAL SALES GROWTH				
STORES IN THE TOP 25% OF ANNUAL SALES GROWTH	7.97	6.58	9.90	59
STORES IN THE BOTTOM 25% OF ANNUAL SALES GROWTH	8.42	7.20	10.42	61
BY SALES PER LABOR HOUR				
UNDER $75.00	6.66	5.81	7.44	48
$75.00 TO $95.00	7.63	6.57	8.71	102
OVER $95.00	10.17	8.48	11.59	93
BY WEEKLY TRANSACTIONS PER SQ. FT. OF SELLING AREA				
UNDER 0.50	7.63	6.65	8.89	79
0.50 TO 0.80	8.50	6.67	10.53	107
OVER 0.80	9.09	7.48	10.16	37

Continued

TABLE 30A
MEDIAN PAYROLL PER LABOR HOUR

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
BY WEEKLY SALES PER SQUARE FOOT OF SELLING AREA				
UNDER $6.50	6.67	5.82	7.97	45
$6.50 TO $9.50	7.98	6.84	9.90	74
OVER $9.50	8.89	7.29	10.48	121
BY CUSTOMER TRANSACTIONS PER LABOR HOUR				
UNDER 4.5	8.34	6.87	9.67	55
4.5 TO 5.5	7.85	6.67	9.66	62
5.6 TO 6.5	7.60	6.09	8.67	55
OVER 6.5	9.19	7.00	11.93	75

TABLE 30B
MEDIAN PAYROLL PER LABOR HOUR

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL STORES	$8.16	$6.76	$10.00	247
BY AVERAGE WEEKLY SALES				
UNDER $100,000	6.88	5.87	8.51	48
$100,000 TO $149,999	7.64	6.05	10.12	50
$150,000 TO $200,000	8.53	7.07	10.00	31
OVER $200,000	8.61	7.39	10.42	114
BY GEOGRAPHIC REGION				
NEW ENGLAND	8.74	7.76	9.54	13
MIDDLE ATLANTIC	9.43	6.86	10.42	27
EAST NORTH CENTRAL	7.26	6.48	7.65	61
WEST NORTH CENTRAL	6.71	6.35	8.89	22
SOUTHEAST	8.47	6.55	10.06	32
WEST SOUTH CENTRAL	7.20	5.95	8.11	23
MOUNTAIN	10.49	8.34	10.92	7
PACIFIC	10.12	9.26	11.59	35
CANADA	11.42	8.48	12.58	27

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 31A
MEDIAN WEEKLY SALES PER CHECKOUT

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL STORES	$23187	$18269	$30865	274
BY STORE FORMAT				
CONVENTIONAL STORES	20721	16875	26838	182
SUPER STORES	28984	23824	34973	58
COMBINATION STORES	26346	22727	32967	17
WAREHOUSE STORES	33596	26716	38039	17
BY TOTAL AREA OF STORES				
UNDER 15,000 SQ. FT.	17308	14134	21795	35
15,000 TO 25,000 SQ. FT.	19835	16827	23942	98
25,001 TO 35,000 SQ. FT.	26772	20769	32051	58
35,001 TO 45,000 SQ. FT.	27949	24404	34269	41
OVER 45,000 SQ. FT.	31469	25160	35527	37
BY SERVICE LEVELS				
LOW SERVICE LEVELS - 3 OR FEWER CHECKED	18185	14159	23462	56
MIDDLE SERVICE LEVELS - 4 TO 6 CHECKED	22641	17989	29519	124
HIGH SERVICE LEVELS - 7 OR MORE CHECKED	26881	22115	33392	94
BY ANNUAL SALES GROWTH				
STORES IN THE TOP 25% OF ANNUAL SALES GROWTH	25741	19231	31115	70
STORES IN THE BOTTOM 25% OF ANNUAL SALES GROWTH	21154	16282	26923	65
BY WEEKLY TRANSACTIONS PER SQ. FT. OF SELLING AREA				
UNDER 0.50	20913	15295	26673	88
0.50 TO 0.80	25481	19231	31368	113
OVER 0.80	23077	18678	32909	43
BY WEEKLY SALES PER SQUARE FOOT OF SELLING AREA				
UNDER $6.50	15481	13461	19192	49
$6.50 TO $9.50	20849	17805	23889	88
OVER $9.50	28478	23942	34808	134

Continued

TABLE 31A
MEDIAN WEEKLY SALES PER CHECKOUT

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
BY CUSTOMER TRANSACTIONS PER LABOR HOUR				
UNDER 4.5	25957	20865	33098	54
4.5 TO 5.5	24720	19423	32346	62
5.6 TO 6.5	19968	15110	27115	53
OVER 6.5	22115	17789	28462	105

TABLE 31B
MEDIAN WEEKLY SALES PER CHECKOUT

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL STORES	$23187	$18269	$30865	274
BY AVERAGE WEEKLY SALES				
UNDER $100,000	15384	13461	18990	55
$100,000 TO $149,999	19231	17324	21058	56
$150,000 TO $200,000	23297	20085	26236	33
OVER $200,000	31035	26346	34973	130
BY GEOGRAPHIC REGION				
NEW ENGLAND	21548	20769	26374	18
MIDDLE ATLANTIC	28109	17308	36131	28
EAST NORTH CENTRAL	23798	19231	31026	69
WEST NORTH CENTRAL	20533	15384	27644	22
SOUTHEAST	20192	14904	31228	33
WEST SOUTH CENTRAL	21115	14209	25000	27
MOUNTAIN	22435	20385	24545	6
PACIFIC	25809	19654	32578	36
CANADA	24188	21500	29077	35

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 32A

MEDIAN SALES PER CUSTOMER TRANSACTION - ENTIRE STORE

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL STORES	$16.76	$13.25	$20.63	255
BY STORE FORMAT				
CONVENTIONAL STORES	14.69	12.11	19.28	172
SUPER STORES	19.13	16.03	25.10	56
COMBINATION STORES	18.07	15.33	20.12	15
WAREHOUSE STORES	24.05	18.57	27.97	12
BY TOTAL AREA OF STORES				
UNDER 15,000 SQ. FT.	12.32	9.34	15.83	34
15,000 TO 25,000 SQ. FT.	14.63	12.02	17.98	94
25,001 TO 35,000 SQ. FT.	17.37	13.61	20.11	50
35,001 TO 45,000 SQ. FT.	19.84	15.35	24.75	38
OVER 45,000 SQ. FT.	23.19	18.98	27.07	34
BY AVERAGE WEEKLY SALES				
UNDER $100,000	12.16	10.22	14.15	54
$100,000 TO $149,999	14.00	12.09	17.28	54
$150,000 TO $200,000	17.71	15.35	19.42	30
OVER $200,000	20.11	17.12	24.61	117
BY SERVICE LEVELS				
LOW SERVICE LEVELS - 3 OR FEWER CHECKED	14.09	12.11	17.28	56
MIDDLE SERVICE LEVELS - 4 TO 6 CHECKED	16.13	12.58	20.71	115
HIGH SERVICE LEVELS - 7 OR MORE CHECKED	19.01	15.45	22.74	84
BY SALES PER LABOR HOUR				
UNDER $75.00	13.57	11.29	16.58	43
$75.00 TO $95.00	15.67	13.06	19.23	99
OVER $95.00	19.28	16.26	24.61	86

Continued

TABLE 32A
MEDIAN SALES PER CUSTOMER TRANSACTION - ENTIRE STORE

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
BY GEOGRAPHIC REGION				
NEW ENGLAND	17.11	13.57	19.69	18
MIDDLE ATLANTIC	23.32	17.63	25.98	28
EAST NORTH CENTRAL	16.76	13.17	19.80	67
WEST NORTH CENTRAL	14.30	11.74	18.18	20
SOUTHEAST	14.54	12.16	18.13	28
WEST SOUTH CENTRAL	14.16	13.15	17.04	25
MOUNTAIN	17.11	13.50	18.98	9
PACIFIC	15.99	12.97	20.98	33
CANADA	19.42	16.26	22.83	27

TABLE 32B
MEDIAN SALES PER CUSTOMER TRANSACTION - ENTIRE STORE

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL STORES	$16.76	$13.25	$20.63	255
BY WEEKLY TRANSACTIONS PER SQ. FT. OF SELLING AREA				
UNDER 0.50	18.15	13.98	23.56	90
0.50 TO 0.80	16.58	13.46	20.24	119
OVER 0.80	13.57	9.34	17.67	43
BY WEEKLY SALES PER SQUARE FOOT OF SELLING AREA				
UNDER $6.50	12.29	10.99	14.16	47
$6.50 TO $9.50	16.11	12.64	18.83	82
OVER $9.50	19.51	15.67	24.27	123
BY CUSTOMER TRANSACTIONS PER LABOR HOUR				
UNDER 4.5	23.15	18.63	26.32	54
4.5 TO 5.5	18.27	15.68	20.58	62
5.6 TO 6.5	14.71	13.27	17.70	56
OVER 6.5	13.06	10.23	17.63	83

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 33A
MEDIAN NUMBER OF WEEKLY CUSTOMER TRANSACTIONS

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL STORES	10700	7578	16200	261
BY STORE FORMAT				
CONVENTIONAL STORES	9000	6652	12418	176
SUPER STORES	16765	13250	20636	57
COMBINATION STORES	12654	10800	20051	16
WAREHOUSE STORES	16950	11670	21700	12
BY TOTAL AREA OF STORES				
UNDER 15,000 SQ. FT.	6300	5010	8000	35
15,000 TO 25,000 SQ. FT.	8427	6700	10500	95
25,001 TO 35,000 SQ. FT.	12646	10131	16050	52
35,001 TO 45,000 SQ. FT.	15288	12109	19000	38
OVER 45,000 SQ. FT.	20000	16307	24348	36
BY SERVICE LEVELS				
LOW SERVICE LEVELS - 3 OR FEWER CHECKED	7329	5244	12840	58
MIDDLE SERVICE LEVELS - 4 TO 6 CHECKED	10250	8000	13807	117
HIGH SERVICE LEVELS - 7 OR MORE CHECKED	15507	10500	20440	86
BY ANNUAL SALES GROWTH				
STORES IN THE TOP 25% OF ANNUAL SALES GROWTH	11252	8181	16482	60
STORES IN THE BOTTOM 25% OF ANNUAL SALES GROWTH	8967	6577	15300	66
BY SALES PER LABOR HOUR				
UNDER $75.00	8200	6160	10241	43
$75.00 TO $95.00	10500	8007	15586	99
OVER $95.00	13170	9500	18700	86
BY WEEKLY SALES PER SQUARE FOOT OF SELLING AREA				
UNDER $6.50	7550	5500	10082	47
$6.50 TO $9.50	9092	6791	11625	82
OVER $9.50	15255	10241	18825	123

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 33B
MEDIAN NUMBER OF WEEKLY CUSTOMER TRANSACTIONS

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL STORES	10700	7578	16200	261
BY CUSTOMER TRANSACTIONS PER LABOR HOUR				
UNDER 4.5	11625	8500	16417	55
4.5 TO 5.5	11302	7782	16765	62
5.6 TO 6.5	9941	7142	15443	56
OVER 6.5	10450	7197	15350	88
BY AVERAGE WEEKLY SALES				
UNDER $100,000	5987	5000	7000	54
$100,000 TO $149,999	8693	7000	10241	54
$150,000 TO $200,000	9588	8596	10700	30
OVER $200,000	16547	12951	19663	117
BY GEOGRAPHIC REGION				
NEW ENGLAND	9180	6851	10500	18
MIDDLE ATLANTIC	13934	7891	17872	28
EAST NORTH CENTRAL	10750	7000	16698	68
WEST NORTH CENTRAL	14083	7356	17062	20
SOUTHEAST	9443	6040	15000	30
WEST SOUTH CENTRAL	9800	7578	12385	25
MOUNTAIN	13807	10700	20000	9
PACIFIC	11000	9000	16765	33
CANADA	12136	8399	15100	30

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 34A

MEDIAN ANNUAL SALES GROWTH FOR STORES IN THE SAMPLE

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL STORES	4.4%	.2%	9.5%	279
BY STORE FORMAT				
CONVENTIONAL STORES	4.2	0	8.3	183
SUPER STORES	4.3	.9	8.5	61
COMBINATION STORES	7.5	3.8	10.5	18
WAREHOUSE STORES	11.4	7.5	14.4	17
BY TOTAL AREA OF STORES				
UNDER 15,000 SQ. FT.	4.0	0	8.3	35
15,000 TO 25,000 SQ. FT.	4.2	-1.3	8.4	97
25,001 TO 35,000 SQ. FT.	4.4	1.1	8.9	60
35,001 TO 45,000 SQ. FT.	5.3	1.3	10.0	42
OVER 45,000 SQ. FT.	5.9	.7	12.3	40
BY SERVICE LEVELS				
LOW SERVICE LEVELS - 3 OR FEWER CHECKED	4.4	0	12.1	58
MIDDLE SERVICE LEVELS - 4 TO 6 CHECKED	4.4	-1.7	10.2	125
HIGH SERVICE LEVELS - 7 OR MORE CHECKED	4.5	2.4	8.3	96
BY ANNUAL SALES GROWTH				
STORES IN THE TOP 25% OF ANNUAL SALES GROWTH	14.9	11.8	23.0	70
STORES IN THE BOTTOM 25% OF ANNUAL SALES GROWTH	-4.2	-6.5	-1.8	69
BY WEEKLY TRANSACTIONS PER SQ. FT. OF SELLING AREA				
UNDER 0.50	4.1	-1.8	10.0	86
0.50 TO 0.80	4.3	.5	7.7	119
OVER 0.80	4.6	1.8	10.1	43
BY WEEKLY SALES PER SQUARE FOOT OF SELLING AREA				
UNDER $6.50	3.3	-2.7	9.9	49
$6.50 TO $9.50	4.3	0	8.3	89
OVER $9.50	4.9	1.4	9.9	137
BY CUSTOMER TRANSACTIONS PER LABOR HOUR				
UNDER 4.5	4.9	-.5	8.1	53
4.5 TO 5.5	5.1	.7	12.3	62
5.6 TO 6.5	4.0	-.5	9.5	54
OVER 6.5	4.3	1.1	8.7	110

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 34B

MEDIAN ANNUAL SALES GROWTH FOR STORES IN THE SAMPLE

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL STORES	4.4%	.2%	9.5%	279
BY AVERAGE WEEKLY SALES				
UNDER $100,000	2.4	-2.7	6.9	54
$100,000 TO $149,999	4.4	2.5	11.8	57
$150,000 TO $200,000	3.9	-.5	7.9	34
OVER $200,000	5.1	1.6	10.7	134
BY GEOGRAPHIC REGION				
NEW ENGLAND	2.3	-3.2	10.5	18
MIDDLE ATLANTIC	4.3	1.9	8.7	30
EAST NORTH CENTRAL	4.4	0	7.7	69
WEST NORTH CENTRAL	3.1	-2.7	7.5	22
SOUTHEAST	2.9	-1.8	6.3	33
WEST SOUTH CENTRAL	5.0	.2	11.2	28
MOUNTAIN	5.3	2.5	8.3	9
PACIFIC	7.1	3.5	14.2	35
CANADA	5.1	.7	15.6	35

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 35

MEDIAN WEEKLY SALES PER EXPRESS CHECKOUT

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL STORES	$16176	$8600	$29000	47
BY STORE FORMAT				
CONVENTIONAL STORES	10676	8250	18800	32
SUPER STORES	28875	17088	46914	8
COMBINATION STORES	67552	39000	85552	4
WAREHOUSE STORES				3
BY TOTAL AREA OF STORES				
UNDER 15,000 SQ. FT.				2
15,000 TO 25,000 SQ. FT.	10000	8500	17112	25
25,001 TO 35,000 SQ. FT.	25707	18000	29650	6
35,001 TO 45,000 SQ. FT.	34400	13650	63521	7
OVER 45,000 SQ. FT.	28875	16176	73809	6
BY AVERAGE WEEKLY SALES				
UNDER $100,000	12000	8000	21000	7
$100,000 TO $149,999	8600	2816	16056	12
$150,000 TO $200,000	11825	9500	22894	8
OVER $200,000	27750	18000	60000	19
BY GEOGRAPHIC REGION				
NEW ENGLAND	10000	8000	17600	5
MIDDLE ATLANTIC	17112	2000	20000	5
EAST NORTH CENTRAL	9000	8000	10000	5
WEST NORTH CENTRAL	29979	19500	68665	8
SOUTHEAST	27495	16176	60000	7
WEST SOUTH CENTRAL				3
MOUNTAIN				0
PACIFIC				3
CANADA	15480	8600	34400	11

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 36
MEDIAN SALES PER CUSTOMER TRANSACTION - EXPRESS CHECKOUTS

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL STORES	$8.25	$6.00	$10.00	39
BY STORE FORMAT				
CONVENTIONAL STORES	7.72	5.00	8.54	24
SUPER STORES	7.89	6.10	11.07	8
COMBINATION STORES	13.14	9.43	17.23	4
WAREHOUSE STORES				3
BY TOTAL AREA OF STORES				
UNDER 15,000 SQ. FT.				1
15,000 TO 25,000 SQ. FT.	8.25	5.73	9.11	18
25,001 TO 35,000 SQ. FT.	8.72	6.10	18.02	6
35,001 TO 45,000 SQ. FT.	8.44	6.20	11.27	7
OVER 45,000 SQ. FT.	8.43	7.54	10.86	6
BY AVERAGE WEEKLY SALES				
UNDER $100,000				3
$100,000 TO $149,999	8.40	6.25	8.48	9
$150,000 TO $200,000	7.65	4.16	11.64	8
OVER $200,000	8.34	6.52	10.86	18
BY GEOGRAPHIC REGION				
NEW ENGLAND	2.50	2.22	3.33	5
MIDDLE ATLANTIC	8.43	6.70	8.47	4
EAST NORTH CENTRAL	6.50	3.65	10.00	4
WEST NORTH CENTRAL	8.86	8.10	15.00	7
SOUTHEAST	7.54	6.10	16.27	7
WEST SOUTH CENTRAL				3
MOUNTAIN				0
PACIFIC				1
CANADA	8.86	8.52	10.16	8

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 37A
PROFILE OF RESPONDING COMPANIES

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL COMPANIES	NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH CENTRAL	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL	171	10	26	38	13	24	14	5	29	12
1 STORE OPERATORS	28.1%	40.0%	26.9%	39.5%	46.2%	16.7%	21.4%	20.0%	27.6%	-
2 - 10 STORE COMPANIES	36.3	50.0	42.3	42.1	30.8	37.5	14.3	40.0	37.9	16.7
11 - 49 STORE COMPANIES	12.9	-	15.4	10.5	-	16.7	28.6	-	17.2	8.3
50 + STORE COMPANIES	22.8	10.0	15.4	7.9	23.1	29.2	35.7	40.0	17.2	75.0
INDEPENDENTS (1 - 10 STORES)	64.3	90.0	69.2	81.6	76.9	54.2	35.7	60.0	65.5	16.7
CHAINS (11 + STORES)	35.7	10.0	30.8	18.4	23.1	45.8	64.3	40.0	34.5	83.3

TABLE 37B
PROFILE OF RESPONDING COMPANIES

		ANNUAL SALES IN MILLIONS							
	ALL COMPANIES	UNDER $10	$10-$30	$31-$100	$101-$250	$251-$500	$501 - $1 BIL.	$1-$3 BIL.	OVER $3 BIL.
TOTAL	171	35	45	33	13	5	11	19	10
1 STORE OPERATORS	28.1%	91.4%	35.6%	-	-	-	-	-	-
2 - 10 STORE COMPANIES	36.3	8.6	64.4	72.7	46.2	-	-	-	-
11 - 49 STORE COMPANIES	12.9	-	-	24.2	30.8	80.0	18.2	21.1	-
50 + STORE COMPANIES	22.8	-	-	3.0	23.1	20.0	81.8	78.9	100.0
INDEPENDENTS (1 - 10 STORES)	64.3	100.0	100.0	72.7	46.2	-	-	-	-
CHAINS (11 + STORES)	35.7	-	-	27.3	53.8	100.0	100.0	100.0	100.0

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 37C

PROFILE OF RESPONDENTS -- TOTAL NUMBER OF STORES OPERATED AND TOTAL OFFERING PREPARED FOODS IN 1990

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL STORES	NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH CENTRAL	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL STORES	12406	107	422	418	339	2274	4947	616	2081	1202
TOTAL STORES OFFERING PREPARED FOODS IN 1990	7813	104	359	322	290	1960	2086	547	1485	660

TABLE 38A

PERCENTAGE OF COMPANIES VIEWING PREPARED FOODS AS:

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL COMPANIES	NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH CENTRAL	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL COMPANIES	165	8	26	37	12	24	14	5	27	12
SOLELY AS A PROFIT CENTER	3.6%	-	3.8%	5.4%	8.3%	-	7.1%	-	3.7%	-
SOLELY AS A TRAFFIC PULL	4.2	-	3.8	5.4	-	4.2	14.3	-	3.7	-
BOTH A PROFIT CENTER AND A TRAFFIC PULL	92.1	100.0	92.3	89.2	91.7	95.8	78.6	100.0	92.6	100.0

TABLE 38B

PERCENTAGE OF COMPANIES VIEWING PREPARED FOODS AS:

		NUMBER OF STORES OPERATED					
	ALL COMPANIES	1 STORE	2 - 10	11 - 49	50+	INDEPENDENT (1-10 STORES)	CHAIN (11+ STORES)
TOTAL COMPANIES	165	44	61	21	39	105	60
SOLELY AS A PROFIT CENTER	3.6%	6.8%	3.3%	4.8%	-	4.8%	1.7%
SOLELY AS A TRAFFIC PULL	4.2	6.8	3.3	9.5	-	4.8	3.3
BOTH A PROFIT CENTER AND A TRAFFIC PULL	92.1	86.4	93.4	85.7	100.0	90.5	95.0

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 39A
MENU INFORMATION

		NUMBER OF STORES OPERATED					
	ALL COMPANIES	1 STORE	2 - 10	11 - 49	50+	INDEPENDENT (1-10 STORES)	CHAIN (11+ STORES)
TOTAL COMPANIES	171	48	62	22	39	110	61
PERCENTAGE OF COMPANIES OFFERING HOT FOODS TO GO	88.3%	75.0%	96.8%	86.4%	92.3%	87.3%	90.2%
PERCENTAGE OF COMPANIES WITH MENU PLANNING AFFECTED BY CUSTOMERS NUTRITIONAL CONCERNS/ INTERESTS	69.6	58.3	67.7	72.7	84.6	63.6	80.3
PERCENTAGE OF COMPANIES USING STANDARDIZED RECIPES IN ALL UNITS	60.8	43.8	58.1	77.3	76.9	51.8	77.0
PERCENTAGE OF COMPANIES MAKING THEIR OWN SAUSAGES	55.0	50.0	62.9	59.1	46.2	57.3	50.8
PERCENTAGE OF COMPANIES OFFERING SIGNATURE ITEMS	54.4	43.8	50.0	68.2	66.7	47.3	67.2
PERCENTAGE OF COMPANIES WITH THEIR OWN SMOKING OPERATIONS	24.6	14.6	21.0	31.8	38.5	18.2	36.1
PERCENTAGE OF COMPANIES USING A CENTRAL KITCHEN	9.9	2.1	9.7	27.3	10.3	6.4	16.4
PERCENTAGE OF COMPANIES USING A SATELLITE ORDERING SYSTEM	7.6	-	11.3	13.6	7.7	6.4	9.8

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 39B
MENU INFORMATION

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL COMPANIES	NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH CENTRAL	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL COMPANIES	171	10	26	38	13	24	14	5	29	12
PERCENTAGE OF COMPANIES OFFERING HOT FOODS TO GO	88.3%	80.0%	92.3%	89.5%	92.3%	91.7%	71.4%	100.0%	89.7%	83.3%
PERCENTAGE OF COMPANIES WITH MENU PLANNING AFFECTED BY CUSTOMERS NUTRITIONAL CONCERNS/ INTERESTS	69.6	50.0	69.2	55.3	76.9	66.7	85.7	80.0	82.8	75.0
PERCENTAGE OF COMPANIES USING STANDARDIZED RECIPES IN ALL UNITS	60.8	60.0	69.2	52.6	76.9	70.8	57.1	60.0	51.7	58.3
PERCENTAGE OF COMPANIES MAKING THEIR OWN SAUSAGES	55.0	60.0	76.9	60.5	69.2	45.8	35.7	-	41.4	66.7
PERCENTAGE OF COMPANIES OFFERING SIGNATURE ITEMS	54.4	50.0	65.4	50.0	53.8	54.2	57.1	60.0	48.3	58.3
PERCENTAGE OF COMPANIES WITH THEIR OWN SMOKING OPERATIONS	24.6	-	3.8	28.9	38.5	20.8	57.1		24.1	41.7
PERCENTAGE OF COMPANIES USING A CENTRAL KITCHEN	9.9	10.0	7.7	13.2	30.8	-	7.1	-	10.3	8.3
PERCENTAGE OF COMPANIES USING A SATELLITE ORDERING SYSTEM	7.6	-	7.7	10.5	15.4	8.3	14.3	-	3.4	-

TABLE 40
PERCENTAGE OF COMPANIES USING THE SAME STANDARDIZED RECIPES IN ALL UNITS

		NUMBER OF STORES OPERATED					
	ALL COMPANIES	1 STORE	2 - 10	11 - 49	50+	INDEPENDENT (1-10 STORES)	CHAIN (11+ STORES)
TOTAL COMPANIES USING THE SAME STANDARDIZED RECIPES IN ALL UNITS	104	21	36	17	30	57	47
PERCENTAGE OF COMPANIES USING A CENTRAL KITCHEN AND/OR A SATELLITE ORDERING SYSTEM	23.1%	4.8%	27.8%	41.2%	20.0%	19.3%	27.7%

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 41
PERCENTAGE OF COMPANIES WITH SIGNATURE ITEMS PREPARING THESE ITEMS:

		NUMBER OF STORES OPERATED					
	ALL COMPANIES	1 STORE	2 - 10	11 - 49	50+	INDEPENDENT (1-10 STORES)	CHAIN (11+ STORES)
TOTAL COMPANIES WITH SIGNATURE ITEMS	93	21	31	15	26	52	41
PERCENTAGE DEVELOPING SOME OF THESE ITEMS IN-HOUSE	93.5%	90.5%	96.8%	100.0%	88.5%	94.2%	92.7%
PERCENTAGE HAVING SUCH ITEMS MANUFACTURED OUTSIDE	40.9	33.3	19.4	53.3	65.4	25.0	61.0

TABLE 42
PERCENTAGE OF COMPANIES OFFERING HOT FOODS TO GO

		NUMBER OF STORES OPERATED					
	ALL COMPANIES	1 STORE	2 - 10	11 - 49	50+	INDEPENDENT (1-10 STORES)	CHAIN (11+ STORES)
TOTAL COMPANIES OFFERING HOT FOODS TO GO	151	36	60	19	36	96	55
NEW ENGLAND	5.3%	5.6%	8.3%	-	2.8%	7.3%	1.8%
MIDDLE ATLANTIC	15.9	16.7	18.3	15.8	11.1	17.7	12.7
EAST NORTH CENTRAL	22.5	33.3	25.0	21.1	8.3	28.1	12.7
WEST NORTH CENTRAL	7.9	13.9	6.7	-	8.3	9.4	5.5
SOUTHEAST	14.6	8.3	15.0	21.1	16.7	12.5	18.2
WEST SOUTH CENTRAL	6.6	2.8	3.3	15.8	11.1	3.1	12.7
MOUNTAIN	3.3	2.8	3.3	-	5.6	3.1	3.6
PACIFIC	17.2	16.7	16.7	26.3	13.9	16.7	18.2
CANADA	6.6	-	3.3	-	22.2	2.1	14.5

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 43
TYPES OF HOT FOODS OFFERED

		ANNUAL SALES IN MILLIONS							
	ALL COMPANIES	UNDER $10	$10-$30	$31-$100	$101-$250	$251-$500	$501 - $1 BIL.	$1-$3 BIL.	OVER $3 BIL.
TOTAL COMPANIES OFFERING HOT FOODS TO GO	151	25	41	30	13	5	9	18	10
PERCENTAGE OF COMPANIES OFFERING HOT FOODS MADE FROM SCRATCH IN-HOUSE	80.1%	92.0%	85.4%	83.3%	76.9%	60.0%	55.6%	72.2%	70.0%
PERCENTAGE OF COMPANIES OFFERING HOT FOODS MANUFACTURED BY OUTSIDE COMAFNIES	74.8	64.0	75.6	83.3	76.9	60.0	100.0	61.1	80.0

TABLE 44
PERCENTAGE OF COMPANIES PRODUCING "FROM SCRATCH" DELI ITEMS IN-HOUSE

		ANNUAL SALES IN MILLIONS							
	ALL COMPANIES	UNDER $10	$10-$30	$31-$100	$101-$250	$251-$500	$501 - $1 BIL.	$1-$3 BIL.	OVER $3 BIL.
TOTAL COMPANIES THAT PRODUCE "FROM SCRATCH" DELI ITEMS IN-HOUSE	138	30	41	22	12	5	7	13	8
1 STORE OPERATORS	30.4%	93.3%	34.1%	-	-	-	-	-	-
2 - 10 STORE COMPANIES	39.1	6.7	65.9	86.4	50.0	-	-	-	-
11 - 49 STORE COMPANIES	12.3	-	-	13.6	33.3	80.0	28.6	30.8	-
50 + STORE COMPANIES	18.1	-	-	-	16.7	20.0	71.4	69.2	100.0
INDEPENDENTS (1 - 10 STORES)	69.6	100.0	100.0	86.4	50.0	-	-	-	-
CHAINS (11 + STORES)	30.4	-	-	13.6	50.0	100.0	100.0	100.0	100.0

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 45
WHERE SAUSAGE IS MADE

		ANNUAL SALES IN MILLIONS							
	ALL COMPANIES	UNDER $10	$10-$30	$31-$100	$101-$250	$251-$500	$501 - $1 BIL.	$1-$3 BIL.	OVER $3 BIL.
TOTAL COMPANIES MAKING THEIR OWN SAUSAGES	87	15	23	21	6	4	4	10	4
IN-STORE	93.1%	100.0%	100.0%	100.0%	66.7%	75.0%	100.0%	80.0%	75.0%
IN A CENTRAL FACILITY	6.9	-	-	-	33.3	25.0	-	20.0	25.0

TABLE 46
WHERE SMOKING OPERATIONS ARE LOCATED

		NUMBER OF STORES OPERATED					
	ALL COMPANIES	1 STORE	2 - 10	11 - 49	50+	INDEPENDENT (1-10 STORES)	CHAIN (11+ STORES)
TOTAL COMPANIES WITH THEIR OWN SMOKING OPERATIONS	41	7	13	7	14	20	21
IN-STORE	75.6%	100.0%	69.2%	57.1%	78.6%	80.0%	71.4%
IN A CENTRAL FACILITY	24.4	-	30.8	42.9	21.4	20.0	28.6

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 47A
PREPARED FOODS PERSONNEL ISSUES

	ALL COMPANIES	NUMBER OF STORES OPERATED 1 STORE	2 - 10	11 - 49	50+	INDEPENDENT (1-10 STORES)	CHAIN (11+ STORES)
TOTAL COMPANIES	171	48	62	22	39	110	61
PERCENTAGE OF COMPANIES EMLOYING OR PLANNING TO EMPLOY FOOD SERVICE PROFESSIONALS	36.8%	18.8%	43.5%	54.5%	38.5%	32.7%	44.3%
PERCENTAGE OF COMPANIES RECRUITING EMPLOYEES FROM RESTAURANTS AND OTHER FOOD SERVICE BACKGROUNDS	62.6	45.8	69.4	81.8	61.5	59.1	68.9
PERCENTAGE OF COMPANIES EMPLOYING PROFESSIONAL CHEFS	24.0	8.3	21.0	50.0	33.3	15.5	39.3
PERCENTAGE OF COMPANIES STATING THAT A PROFESSIONAL CHEF IS NECESSARY TO RUN A SUCCESSFUL PREPARED FOODS DEPARTMENT	19.3	10.4	22.6	22.7	23.1	17.3	23.0

TABLE 47B
PREPARED FOODS PERSONNEL ISSUES

	ALL COMPANIES	GEOGRAPHIC REGION OF HEADQUARTERS NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH CENTRAL	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL COMPANIES	171	10	26	38	13	24	14	5	29	12
PERCENTAGE OF COMPANIES EMLOYING OR PLANNING TO EMPLOY FOOD SERVICE PROFESSIONALS	36.8%	30.0%	42.3%	36.8%	38.5%	25.0%	57.1%	40.0%	41.4%	16.7%
PERCENTAGE OF COMPANIES RECRUITING EMPLOYEES FROM RESTAURANTS AND OTHER FOOD SERVICE BACKGROUNDS	62.6	20.0	61.5	55.3	69.2	66.7	78.6	80.0	79.3	41.7
PERCENTAGE OF COMPANIES EMPLOYING PROFESSIONAL CHEFS	24.0	20.0	15.4	21.1	23.1	12.5	42.9	40.0	34.5	25.0
PERCENTAGE OF COMPANIES STATING THAT A PROFESSIONAL CHEF IS NECESSARY TO RUN A SUCCESSFUL PREPARED FOODS DEPARTMENT	19.3	20.0	19.2	15.8	7.7	8.3	21.4	20.0	31.0	33.3

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 48

AVERAGE RATING OF TRAINING METHODS FOR PREPARED FOODS PERSONNEL

		NUMBER OF STORES OPERATED					
	ALL COMPANIES	1 STORE	2 - 10	11 - 49	50+	INDEPENDENT (1-10 STORES)	CHAIN (11+ STORES)
TOTAL COMPANIES	171	48	62	22	39	110	61
ON-THE-JOB TRAINING	3.6	3.7	3.5	3.7	3.7	3.6	3.7
JOB OR PRODUCT SPECIFIC WORKSHOPS, CONFERENCES, CLASSES	2.8	2.6	2.6	3.2	3.1	2.6	3.1
VISITING COMPETITORS	2.6	2.6	2.8	2.3	2.6	2.7	2.5
FORMAL SALES/SERVICE TRAINING	2.4	2.4	2.3	2.7	2.5	2.3	2.6
RESTAURANT/HOTEL TRAINING	1.8	1.7	1.8	2.4	1.8	1.8	2.0
CULINARY SCHOOL TRAINING	1.7	1.5	1.8	2.2	1.7	1.7	1.9

NOTE: RATINGS ARE: 4 = ESSENTIAL, 3 = VERY IMPORTANT, 2 = IMPORTANT, 1 = NOT IMPORTANT

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 49
FOOD SAFETY AND PACKAGING ISSUES

		NUMBER OF STORES OPERATED					
	ALL COMPANIES	1 STORE	2 - 10	11 - 49	50+	INDEPENDENT (1-10 STORES)	CHAIN (11+ STORES)
TOTAL COMPANIES	171	48	62	22	39	110	61
PERCENTAGE OF COMPANIES WITH A FORMAL DATE ROTATION PROGRAM SPECIFICALLY SET UP FOR PREPARED FOODS	76.6%	79.2%	69.4%	81.8%	82.1%	73.6%	82.0%
PERCENTAGE OF COMPANIES USING THE FOLLOWING TYPES OF DATING ON PREPARED FOODS:							
BEST IF SOLD BY	37.4	37.5	27.4	59.1	41.0	31.8	47.5
CODE DATING	34.5	35.4	37.1	27.3	33.3	36.4	31.1
SHELF DATES	32.2	37.5	24.2	27.3	41.0	30.0	36.1
PACK DATES	29.2	22.9	25.8	27.3	43.6	24.5	37.7
BEST IF EATEN BY	11.7	4.2	16.1	4.5	17.9	10.9	13.1
NONE	3.5	2.1	8.1	-	-	5.5	-
PRECENTAGE OF COMPANIES CURRENTLY PROVIDING CONSUMER LITERATURE ON FOOD SAFETY CONNECTED TO PREPARED FOODS	29.8	29.2	22.6	31.8	41.0	25.5	37.7
PERCENTAGE OF COMPANIES USING VACUUM PACKAGING IN-STORE	39.2	25.0	37.1	40.9	59.0	31.8	52.5
PERCENTAGE OF COMPANIES USING VACUUM PACKAGING IN A CENTRAL FACILITY	11.1	8.3	12.9	9.1	12.8	10.9	11.5

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 50A
EXECUTIVE'S AVERAGE RATING OF THE FUTURE GROWTH POTENTIAL FOR THESE SERVICES

		NUMBER OF STORES OPERATED					
	ALL COMPANIES	1 STORE	2 - 10	11 - 49	50+	INDEPENDENT (1-10 STORES)	CHAIN (11+ STORES)
TOTAL COMPANIES	171	48	62	22	39	110	61
CATERING/PARTY TRAYS	3.5	3.5	3.4	3.4	3.7	3.4	3.6
READY MEALS/SEMI-PREPARED	3.2	3.0	3.3	3.4	3.2	3.1	3.3
SEPARATE REGISTERS FOR DELI/PREPARED FOODS	3.0	2.9	3.0	2.9	3.1	3.0	3.0
TAKE-OUT RESTAURANTS	2.8	2.9	2.6	2.6	2.8	2.7	2.8
FAX/COMPUTER ORDERING AT THE DELI	2.4	2.1	2.6	2.5	2.3	2.4	2.4
SELF-SERVE RESTAURANTS	2.0	1.9	2.1	2.3	2.0	2.0	2.1
SIT-DOWN RESTAURANTS	2.0	2.0	2.1	2.1	1.8	2.0	1.9
HOME DELIVERY FOR PREPARED FOODS	1.8	1.7	1.6	2.0	1.8	1.7	1.9
DIRVE-THROUGH PICK-UP	1.7	2.2	1.6	1.8	1.3	1.8	1.5

TABLE 50B
EXECUTIVE'S AVERAGE RATING OF THE FUTURE GROWTH POTENTIAL FOR THESE SERVICES

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL COMPANIES	NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH CENTRAL	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL COMPANIES	171	10	26	38	13	24	14	5	29	12
CATERING/PARTY TRAYS	3.5	3.6	3.6	3.5	3.5	3.4	3.4	3.3	3.3	3.5
READY MEALS/SEMI-PREPARED	3.2	3.2	3.2	3.2	3.2	3.3	3.2	3.0	3.3	2.9
SEPARATE REGISTERS FOR DELI/PREPARED FOODS	3.0	2.5	2.9	3.0	3.2	2.5	3.1	2.5	3.4	3.2
TAKE-OUT RESTAURANTS	2.8	2.8	2.7	2.7	3.0	2.9	2.6	2.3	3.0	2.1
FAX/COMPUTER ORDERING AT THE DELI	2.4	2.6	2.7	2.3	2.5	2.0	2.0	2.0	2.5	2.5
SELF-SERVE RESTAURANTS	2.0	2.0	2.0	1.9	2.2	2.1	2.0	2.0	2.1	1.8
SIT-DOWN RESTAURANTS	2.0	1.9	2.0	2.0	2.5	1.9	2.1	1.8	1.9	1.7
HOME DELIVERY FOR PREPARED FOODS	1.8	1.6	1.8	1.8	2.0	1.4	1.8	2.0	1.8	1.6
DIRVE-THROUGH PICK-UP	1.7	1.8	1.6	1.9	1.7	1.7	1.6	1.5	1.8	1.2

NOTE: RATINGS ARE: 4 = VERY STRONG, 3 = STRONG, 2 = MODERATE, 1 = WEAK

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 51A
EXECUTIVE'S AVERAGE RATING OF THE FUTURE GROWTH POTENTIAL FOR PREPARED FOODS

		NUMBER OF STORES OPERATED					
	ALL COMPANIES	1 STORE	2 - 10	11 - 49	50+	INDEPENDENT (1-10 STORES)	CHAIN (11+ STORES)
TOTAL COMPANIES	171	48	62	22	39	110	61
PIZZA	3.2	3.0	3.1	3.5	3.6	3.1	3.6
COMBINATION SERVICE/ SELF-SERVICE MEAT AND CHEESE	3.2	3.1	3.1	3.6	3.4	3.1	3.5
FRIED CHICKEN IN THE DELI	3.1	3.0	3.2	3.0	3.0	3.1	3.0
SERVICE MEAT AND CHEESE IN THE DELI	3.1	3.3	2.9	3.3	2.8	3.1	3.0
BBQ CHICKEN	3.1	3.0	3.0	3.2	3.2	3.0	3.2
SERVICE SALADS	3.0	2.8	3.0	3.2	3.1	2.9	3.2
SELF-SERVICE SALADS	2.9	2.7	2.8	3.4	3.2	2.8	3.3
SELF-SERVICE MEAT AND CHEESE IN THE DELI	2.9	2.6	2.9	3.3	3.0	2.7	3.1
MEXICAN FOODS	2.4	2.3	2.4	2.4	2.5	2.3	2.4
VACUUM-SEAL DELI MEAT AND CHEESE MADE IN-STORE	2.4	2.3	2.4	2.6	2.3	2.4	2.4
GRILLED CHICKEN	2.4	2.5	2.2	2.7	2.3	2.3	2.4
CHINESE FOODS	2.3	2.1	2.3	2.7	2.5	2.2	2.6
VACUUM-SEAL DELI MEAT AND CHEESE MADE OUT-OF-HOUSE	2.1	1.8	2.1	2.5	2.4	2.0	2.4
FLAME-ROASTED CHICKEN	1.9	1.8	2.0	2.0	1.7	1.9	1.8

NOTE: RATINGS ARE: 4 = VERY STRONG, 3 = STRONG, 2 = MODERATE, 1 = WEAK

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 51B

EXECUTIVE'S AVERAGE RATING OF THE FUTURE GROWTH POTENTIAL FOR PREPARED FOODS

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL COMPANIES	NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH CENTRAL	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL COMPANIES	171	10	26	38	13	24	14	5	29	12
PIZZA	3.2	2.8	3.3	3.0	3.2	3.3	3.5	3.0	3.3	3.7
COMBINATION SERVICE/ SELF-SERVICE MEAT AND CHEESE	3.2	3.2	3.0	3.2	3.2	3.1	3.3	3.3	3.4	3.5
FRIED CHICKEN IN THE DELI	3.1	2.7	3.4	3.1	3.1	3.5	3.1	2.5	2.9	2.4
SERVICE MEAT AND CHEESE IN THE DELI	3.1	2.8	3.0	3.2	2.9	3.1	3.5	3.3	2.9	3.1
BBQ CHICKEN	3.1	3.2	3.2	2.8	2.8	3.3	2.9	3.3	3.2	3.2
SERVICE SALADS	3.0	2.6	3.3	2.7	3.1	3.0	3.0	3.3	3.0	3.3
SELF-SERVICE SALADS	2.9	3.0	2.3	3.1	3.0	3.1	3.0	3.3	3.1	2.7
SELF-SERVICE MEAT AND CHEESE IN THE DELI	2.9	2.4	2.4	2.8	2.8	2.7	3.1	3.3	3.3	3.4
MEXICAN FOODS	2.4	2.5	1.9	2.5	2.6	2.1	2.5	2.3	2.8	2.1
VACUUM-SEAL DELI MEAT AND CHEESE MADE IN-STORE	2.4	2.6	2.2	2.4	2.9	2.3	2.5	2.0	2.0	3.0
GRILLED CHICKEN	2.4	2.6	2.5	2.2	2.2	2.2	2.9	2.3	2.5	1.9
CHINESE FOODS	2.3	2.1	2.2	2.5	2.6	1.9	2.2	2.8	2.5	2.2
VACUUM-SEAL DELI MEAT AND CHEESE MADE OUT-OF-HOUSE	2.1	2.3	1.7	1.9	2.5	2.3	2.4	2.5	2.2	2.3
FLAME-ROASTED CHICKEN	1.9	2.5	1.9	1.8	2.3	1.5	2.4	1.5	1.9	1.5

NOTE: RATINGS ARE: 4 - VERY STRONG, 3 - STRONG, 2 - MODERATE, 1 - WEAK

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 52A
EXECUTIVE'S AVERAGE RANKING OF ISSUES FACING PREPARED FOODS IN THE SUPERMARKETS

	ALL COMPANIES	NUMBER OF STORES OPERATED					
		1 STORE	2 - 10	11 - 49	50+	INDEPENDENT (1-10 STORES)	CHAIN (11+ STORES)
TOTAL COMPANIES	171	48	62	22	39	110	61
ENSURING THE SAFETY OF PREPARED FOOD PRODUCTS	5.6	5.8	5.1	5.8	5.8	5.4	5.8
ENSURING THE QUALITY OF PREPARED FOOD PRODUCTS	5.2	5.3	5.1	5.5	5.1	5.2	5.2
OBTAINING AND RETAINING QUALIFIED STAFF	4.8	4.7	4.8	4.8	5.0	4.7	4.9
MANAGING LABOR COSTS AND ACHIEVING HIGHER LEVELS OF PRODUCTIVITY	4.1	4.3	4.1	3.9	4.0	4.2	4.0
PROPER UNDERSTANDING OF CONSUMERS' NEEDS	4.0	3.8	4.4	3.5	3.8	4.1	3.7
STAYING ABREAST OF NEW DEVELOPMENTS	2.2	2.0	2.3	2.4	2.3	2.2	2.3
COMPETITION FROM OTHER OUTLETS AND FAST-FOOD RESTAURANTS	2.2	2.6	2.2	2.1	1.9	2.4	1.9

TABLE 52B
EXECUTIVE'S AVERAGE RANKING OF ISSUES FACING PREPARED FOODS IN THE SUPERMARKETS

	ALL COMPANIES	GEOGRAPHIC REGION OF HEADQUARTERS								
		NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH CENTRAL	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL COMPANIES	171	10	26	38	13	24	14	5	29	12
ENSURING THE SAFETY OF PREPARED FOOD PRODUCTS	5.6	5.8	6.3	5.6	4.5	5.8	4.3	6.7	5.0	6.2
ENSURING THE QUALITY OF PREPARED FOOD PRODUCTS	5.2	5.3	5.4	5.3	5.3	4.8	5.3	5.0	5.6	4.8
OBTAINING AND RETAINING QUALIFIED STAFF	4.8	4.0	4.8	4.7	4.4	4.7	5.9	5.7	4.9	5.2
MANAGING LABOR COSTS AND ACHIEVING HIGHER LEVELS OF PRODUCTIVITY	4.1	3.0	4.4	3.8	3.9	4.8	4.1	4.7	4.4	3.6
PROPER UNDERSTANDING OF CONSUMERS' NEEDS	4.0	5.0	3.2	3.5	5.5	3.5	4.6	2.7	5.2	4.4
STAYING ABREAST OF NEW DEVELOPMENTS	2.2	3.0	2.0	2.0	2.3	2.2	2.6	2.3	2.4	2.8
COMPETITION FROM OTHER OUTLETS AND FAST-FOOD RESTAURANTS	2.2	2.0	1.9	3.1	2.3	2.3	1.3	1.0	2.0	1.0

NOTE: RANKINGS ARE: 7 BEING THE MOST SERIOUS AND 1 BEING THE LEAST SERIOUS

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 53A

EXECUTIVE'S AVERAGE RATING OF THESE STATEMENTS AS TO THEIR RELATIVE IMPORTANCE IN SUPERMARKET FOODSERVICE DEPARTMENTS

		NUMBER OF STORES OPERATED					
	ALL COMPANIES	1 STORE	2 - 10	11 - 49	50+	INDEPENDENT (1-10 STORES)	CHAIN (11+ STORES)
TOTAL COMPANIES	171	48	62	22	39	110	61
HOW IMPORTANT IS IT TO CREATE AND MAINTAIN AN IMAGE OF FRESHNESS IN THE FOODSERVICE DEPARTMENT	3.9	3.8	3.9	4.0	3.9	3.9	4.0
HOW IMPORTANT A PART DO FOOD SERVICE DEPARTMENTS PLAY IN CREATING AN OVERALL IMAGE FOR THE STORE	3.3	3.3	3.2	3.4	3.3	3.2	3.3
HOW IMPORTANT IS PACKAGING TO THE INITIAL SUCCESS OF A NEW PRODUCT	3.0	3.1	3.0	3.0	3.1	3.0	3.0
HOW IMPORTANT ARE SEASONAL PROMOTIONS TO THE SUCCESS OF THE FOODSERVICE DEPARTMENT	2.9	3.0	2.8	3.0	3.1	2.9	3.0
HOW IMPORTANT IS THE LOCATION OF THE FOODSERVICE DEPARTMENT WITHING THE STORE	2.9	2.7	2.9	3.1	3.7	2.8	3.1
HOW IMPORTANT IS IT TO HAVE THE PREPARED FOODS DEPARMENT AS A PART OF THE DELI DEPARTMENT	2.8	2.9	2.9	1.9	3.1	2.9	2.7
HOW IMPORTANT IS IT TO LOCATE SELF-SERVICE AREAS ADJACENT TO THEIR SERVICE AREA COUNTERPART	2.6	2.3	2.8	2.9	2.5	2.6	2.7
HOW IMPORTANT ARE NUTRITION AND INGREDIENT LABELING TO THE SUCCESS OF THE FOOD SERVICE DEPARTMENT	2.6	2.5	2.4	2.9	2.8	2.4	2.8
HOW IMPORTANT IS CROSS MERCHANDISING WITH OTHER DEPARTMENTS	2.4	2.5	2.3	2.4	2.3	2.4	2.3
HOW IMPORTANT IS IT TO HAVE THE PREPARED FOODS DEPARMENT AS A SEPARATE DEPARTMENT	1.7	1.6	1.7	2.3	1.7	1.6	1.9

NOTE: RATINGS ARE: 4 = ESSENTIAL, 3 = VERY IMPORTANT, 2 = IMPORTANT, 1 = NOT IMPORTANT

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 53B

EXECUTIVE'S AVERAGE RATING OF THESE STATEMENTS AS TO THEIR RELATIVE IMPORTANCE IN SUPERMARKET FOODSERVICE DEPARTMENTS

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL COMPANIES	NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH CENTRAL	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL COMPANIES	171	10	26	38	13	24	14	5	29	12
HOW IMPORTANT IS IT TO CREATE AND MAINTAIN AN IMAGE OF FRESHNESS IN THE FOODSERVICE DEPARTMENT	3.9	4.0	3.8	3.8	3.9	4.0	4.0	4.0	3.9	3.9
HOW IMPORTANT A PART DO FOOD SERVICE DEPARTMENTS PLAY IN CREATING AN OVERALL IMAGE FOR THE STORE	3.3	3.1	3.0	3.3	3.3	3.2	3.1	3.6	3.6	3.2
HOW IMPORTANT IS PACKAGING TO THE INITIAL SUCCESS OF A NEW PRODUCT	3.0	2.9	3.0	2.9	3.0	3.1	3.1	3.2	3.1	3.5
HOW IMPORTANT ARE SEASONAL PROMOTIONS TO THE SUCCESS OF THE FOODSERVICE DEPARTMENT	2.9	2.4	2.7	3.0	3.2	3.0	3.1	3.0	3.1	2.7
HOW IMPORTANT IS THE LOCATION OF THE FOODSERVICE DEPARTMENT WITHING THE STORE	2.9	2.8	2.8	2.9	2.8	3.1	2.8	2.8	3.1	3.4
HOW IMPORTANT IS IT TO HAVE THE PREPARED FOODS DEPARMENT AS A PART OF THE DELI DEPARTMENT	2.8	2.8	2.4	2.8	2.9	3.2	2.7	3.4	2.7	2.9
HOW IMPORTANT IS IT TO LOCATE SELF-SERVICE AREAS ADJACENT TO THEIR SERVICE AREA COUNTERPART	2.6	2.6	2.4	2.6	2.8	2.6	2.4	3.2	2.7	2.5
HOW IMPORTANT ARE NUTRITION AND INGREDIENT LABELING TO THE SUCCESS OF THE FOOD SERVICE DEPARTMENT	2.6	2.2	2.3	2.4	2.5	2.8	2.5	3.2	2.7	3.4
HOW IMPORTANT IS CROSS MERCHANDISING WITH OTHER DEPARTMENTS	2.4	2.3	2.3	2.3	2.5	2.3	2.5	2.8	2.3	2.4
HOW IMPORTANT IS IT TO HAVE THE PREPARED FOODS DEPARMENT AS A SEPARATE DEPARTMENT	1.7	1.9	1.8	1.4	2.0	1.7	1.7	1.6	1.9	1.9

NOTE: RATINGS ARE: 4 - ESSENTIAL, 3 - VERY IMPORTANT, 2 - IMPORTANT, 1 - NOT IMPORTANT

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 54
PROFILE OF RESPONDENTS -- NUMBER OF SUPERMARKETS OPERATED

		1990 SALES (IN MILLIONS OF DOLLARS)								NUMBER OF STORES			
	ALL COMPANIES	UNDER $10	$10-$30	$31-$100	$101-$250	$251-$500	$501-$999	$1-3 BIL	OVER $3 BIL	1	2-10	11-49	50 +
TOTAL COMPANIES	90	21	7	9	11	5	12	18	7	14	22	15	39
1 STORE OPERATORS	15.6%	61.9%	-	11.1%	-	-	-	-	-	100.0%	-	-	-
2 - 10 STORE COMPANIES	24.4	33.3	85.7	66.7	27.3	-	-	-	-	-	100.0	-	-
11 - 49 STORE COMPANIES	16.7	4.8	-	22.2	63.6	40.0	8.3	11.1	-	-		100.0	-
50 + STORE COMPANIES	43.3	-	14.3	-	9.1	60.0	91.7	88.9	100.0	-	-	-	100.0
INDEPENDENTS (1 - 10 STORES)	40.0	95.2	85.7	77.8	27.3	-	-	-	-	100.0	100.0	-	-
CHAINS (11 + STORES)	60.0	4.8	14.3	22.2	72.7	100.0	100.0	100.0	100.0	-	-	100.0	100.0

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 55
MEDIAN OF THE AVERAGE ANNUAL ENERGY BILL PER STORE IN 1989

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
TOTAL STORES	$111000	$86000	$125630	4935
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10	65500	52900	81000	20
10 - 30	96000	96000	96000	130
31 - 100	53562	49416	100000	53
101 - 250	68542	50412	101218	84
251 - 500	32680	32680	110000	85
501 - 999	114000	108000	146400	479
1 - 3 BILLION	105000	65790	160000	1737
OVER 3 BILLION	111000	111000	125630	2347
NUMBER OF STORES				
1	63485	43800	81000	12
2 - 10	65000	49416	120000	65
11 - 49	110000	65360	180000	195
50 +	111000	91000	125630	4663

NOTE: WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 56
MEDIAN OF THE AVERAGE ANNUAL ENERGY BILL PER STORE IN 1990

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
TOTAL STORES	$117000	$73100	$126278	5111
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10	63783	53900	78340	24
10 - 30	102000	102000	102000	126
31 - 100	53091	51696	103000	56
101 - 250	74734	57000	103869	133
251 - 500	34400	34400	115000	85
501 - 999	114000	109636	151800	479
1 - 3 BILLION	108000	70004	181000	1616
OVER 3 BILLION	117000	117000	126278	2592
NUMBER OF STORES				
1	59819	45600	80000	14
2 - 10	74734	51696	132000	66
11 - 49	103869	57000	200000	244
50 +	117000	73100	126278	4787

NOTE: WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 57

MEDIAN OF THE AVERAGE KILOWATT-HOUR PER DAY PER 100 SQUARE FOOT OF SELLING AREA

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
TOTAL STORES	23	20	23	3693
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10	23	14	25	6
10 - 30	28	28	28	122
31 - 100	27	14	27	23
101 - 250	23	21	23	88
251 - 500				0
501 - 999	16	16	24	421
1 - 3 BILLION	18	12	22	769
OVER 3 BILLION	23	23	23	2264
NUMBER OF STORES				
1				3
2 - 10	25	14	35	31
11 - 49	23	17	23	120
50 +	23	20	23	3539

NOTE: WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 58

MEDIAN OF THE AVERAGE COST PER KILOWATT-HOUR PER STORE IN 1989

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
TOTAL STORES	$0.06	$0.06	$0.07	4990
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10	0.06	0.06	0.06	9
10 - 30	0.06	0.06	0.06	122
31 - 100	0.05	0.05	0.06	30
101 - 250	0.04	0.04	0.05	71
251 - 500	0.06	0.05	0.06	101
501 - 999	0.06	0.05	0.07	592
1 - 3 BILLION	0.06	0.05	0.07	1718
OVER 3 BILLION	0.06	0.06	0.07	2347
NUMBER OF STORES				
1	0.07	0.06	0.25	4
2 - 10	0.03	0.03	0.05	31
11 - 49	0.06	0.05	0.07	203
50 +	0.06	0.06	0.07	4752

NOTE: WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 59

MEDIAN OF THE AVERAGE COST PER KILOWATT-HOUR PER STORE IN 1990

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
TOTAL STORES	$0.06	$0.05	$0.07	5365
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10	0.06	0.06	0.07	10
10 - 30	0.07	0.07	0.07	122
31 - 100	0.06	0.05	0.06	44
101 - 250	0.04	0.04	0.06	120
251 - 500	0.06	0.05	0.06	101
501 - 999	0.06	0.05	0.07	658
1 - 3 BILLION	0.05	0.05	0.08	1718
OVER 3 BILLION	0.06	0.06	0.07	2592
NUMBER OF STORES				
1	0.06	0.06	0.07	5
2 - 10	0.04	0.03	0.06	45
11 - 49	0.06	0.05	0.07	252
50 +	0.06	0.05	0.07	5063

NOTE: WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 60

MEDIAN OF ANNUAL AMOUNT REBATED TO COMPANIES BY LOCAL UTILITIES FOR ENERGY EFFICIENCIES

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
TOTAL STORES	$50000	$39133	$50000	2971
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10				0
10 - 30				0
31 - 100	100	100	100	13
101 - 250				0
251 - 500				0
501 - 999	20000	5000	30000	322
1 - 3 BILLION	43000	39133	57714	907
OVER 3 BILLION	50000	50000	50000	1729
NUMBER OF STORES				
1				0
2 - 10				0
11 - 49	114000	20000	114000	84
50 +	50000	42000	50000	2887

TABLE 61

PERCENTAGE OF STORES THAT HAVE HVAC EQUIPMENT

		1990 SALES (IN MILLIONS OF DOLLARS)								NUMBER OF STORES			
	ALL STORES	UNDER $10	$10- $30	$31- $100	$101- $250	$251- $500	$501- $999	$1-3 BIL	OVER $3 BIL	1	2-10	11-49	50 +
TOTAL STORES	5493	42	132	61	183	213	755	1760	2347	14	79	269	5131
SPLIT SYSTEMS	60.9%	26.2%	78.0%	29.5%	63.9%	54.0%	45.6%	51.8%	73.6%	28.6%	39.2%	36.4%	62.6%
ROOF TOP UNITS	44.4	76.2	15.2	54.1	41.5	44.1	45.8	41.0	47.6	57.1	77.2	37.5	44.2
HUMID CLIMATE OR LOW DEWPOINT AC SYSTEM	11.5	16.7	6.8	23.0	12.0	10.8	4.1	9.4	15.4	35.7	25.3	15.2	11.1
DESSICANT DEHUMIDIFIERS	2.8	-	-	-	.5	-	2.6	1.8	4.3	-	1.3	-	3.0
HEAT PIPE	.2	4.8	-	-	-	.9	.4	.2	-	14.3	-	1.9	.1
OTHER	3.1	2.4	-	-	1.1	-	6.4	6.8	-	-	1.3	3.3	3.1

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 62

PERCENTAGE OF STORES THAT HAVE THE FOLLOWING:

	1990 SALES (IN MILLIONS OF DOLLARS)									NUMBER OF STORES			
	ALL STORES	UNDER $10	$10-$30	$31-$100	$101-$250	$251-$500	$501-$999	$1-3 BIL	OVER $3 BIL	1	2-10	11-49	50 +
TOTAL STORES	5982	44	132	61	210	213	755	1975	2592	14	80	253	5635
HEAT RECLAIM HEATING	79.2%	47.7%	87.1%	65.6%	72.4%	71.8%	77.1%	75.9%	83.8%	78.6%	70.0%	68.0%	79.8%
TOTAL STORES	4687	39	130	60	177	163	599	1959	1560	10	77	289	4311
NIGHT SETBACK TEMPERATURE CONTROLS	52.2%	20.5%	43.8%	23.3%	28.2%	23.9%	51.6%	44.3%	70.8%	50.0%	27.3%	40.8%	53.4%
TOTAL STORES	5082	37	126	60	139	239	665	1616	2200	8	79	308	4687
TWO-SPEED OR VARIABLE AIR HANDLERS	19.9%	24.3%	4.0%	6.7%	5.8%	28.9%	8.6%	10.2%	31.5%	37.5%	26.6%	8.1%	20.5%

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 63

METHODS USED BY COMPANIES TO CONTROL HEATING COSTS

		1990 SALES (IN MILLIONS OF DOLLARS)								NUMBER OF STORES			
	ALL COMPANIES	UNDER $10	$10-$30	$31-$100	$101-$250	$251-$500	$501-$999	$1-3 BIL	OVER $3 BIL	1	2-10	11-49	50 +
TOTAL COMPANIES	90	21	7	9	11	5	12	18	7	14	22	15	39
INSTALLED HEAT RECLAMATION SYSTEMS TIED IN WITH REFRIGERATION COMPRESSORS													
NEW	75.6%	33.3%	57.1%	77.8%	81.8%	100.0%	100.0%	94.4%	100.0%	42.9%	50.0%	86.7%	97.4%
RETROFIT	51.1	38.1	71.4	55.6	27.3	60.0	50.0	66.7	57.1	35.7	50.0	46.7	59.0
REDUCED STORE FRONT OR OTHER WINDOWS													
NEW	40.0	14.3	57.1	33.3	45.5	80.0	41.7	44.4	57.1	14.3	36.4	46.7	48.7
RETROFIT	21.1	19.0	28.6	11.1	18.2	60.0	25.0	16.7	14.3	14.3	18.2	26.7	23.1
LOWERED TEMPERATURES IN THE STORE AT CERTAIN TIMES OF DAY													
NEW	31.1	14.3	-	22.2	36.4	60.0	33.3	44.4	57.1	14.3	13.6	40.0	43.6
RETROFIT	27.8	14.3	28.6	22.2	9.1	60.0	25.0	38.9	57.1	7.1	27.3	20.0	38.5
CHANGED HEATING SYSTEMS													
NEW	12.2	-	14.3	-	-	40.0	25.0	11.1	42.9	-	4.5	13.3	20.5
RETROFIT	33.3	14.3	42.9	22.2	27.3	40.0	50.0	50.0	28.6	7.1	31.8	26.7	46.2
IMPROVED EFFICIENCY OF BOILER OR AUXILIARY HEAT SOURCE													
NEW	10.0	4.8	-	-	-	40.0	8.3	16.7	28.6	7.1	-	6.7	17.9
RETROFIT	17.8	-	14.3	11.1	18.2	60.0	16.7	33.3	14.3	-	9.1	20.0	28.2
REDUCED INFILTRATION LOSSES													
NEW	38.9	19.0	14.3	33.3	27.3	60.0	50.0	55.6	71.4	28.6	4.5	66.7	51.3
RETROFIT	31.1	9.5	28.6	22.2	27.3	40.0	33.3	61.1	28.6	7.1	13.6	40.0	46.2
OTHER	8.9	9.5	-	11.1	9.1	20.0	8.3	11.1	-	14.3	4.5	6.7	10.3
NONE OF THE ABOVE	4.4	14.3	-	-	9.1	-	-	-	-	14.3	4.5	6.7	-

NOTE: MULTIPLE RESPONSES ALLOWED

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 64

METHODS USED BY COMPANIES TO CONTROL AIR CONDITIONING COSTS

		1990 SALES (IN MILLIONS OF DOLLARS)								NUMBER OF STORES			
	ALL COMPANIES	UNDER $10	$10-$30	$31-$100	$101-$250	$251-$500	$501-$999	$1-3 BIL	OVER $3 BIL	1	2-10	11-49	50 +
TOTAL COMPANIES	90	21	7	9	11	5	12	18	7	14	22	15	39
SHUT OFF COOLING SYSTEMS AT CERTAIN TIMES OF THE DAY													
NEW	26.7%	19.0%	28.6%	22.2%	9.1%	60.0%	25.0%	38.9%	28.6%	21.4%	13.6%	33.3%	33.3%
RETROFIT	16.7	4.8	42.9	-	9.1	60.0	8.3	22.2	28.6	-	13.6	20.0	23.1
RAISED TEMPERATURES													
NEW	37.8	23.8	14.3	44.4	18.2	80.0	33.3	50.0	71.4	35.7	22.7	26.7	51.3
RETROFIT	25.6	4.8	42.9	11.1	18.2	80.0	16.7	38.9	42.9	7.1	18.2	26.7	35.9
MODERATED OUTSIDE AIR INTAKE													
NEW	46.7	19.0	42.9	33.3	54.5	60.0	66.7	61.1	57.1	28.6	22.7	60.0	61.5
RETROFIT	28.9	4.8	42.9	22.2	27.3	60.0	25.0	50.0	28.6	7.1	13.6	33.3	43.6
OTHER													
NEW	12.2	9.5	28.6	11.1	-	20.0	-	27.8	-	14.3	9.1	6.7	15.4
RETROFIT	4.4	4.8	14.3	-	-	-	-	11.1	-	-	4.5	-	7.7

NOTE: MULTIPLE RESPONSES ALLOWED

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 65
METHODS USED BY COMPANIES TO INCREASE INSULATION

		1990 SALES (IN MILLIONS OF DOLLARS)								NUMBER OF STORES			
	ALL COMPANIES	UNDER $10	$10-$30	$31-$100	$101-$250	$251-$500	$501-$999	$1-3 BIL	OVER $3 BIL	1	2-10	11-49	50 +
TOTAL COMPANIES	90	21	7	9	11	5	12	18	7	14	22	15	39
ADDED INSULATION TO THE ROOF													
NEW	50.0%	28.6%	28.6%	44.4%	54.5%	60.0%	91.7%	55.6%	42.9%	42.9%	22.7%	66.7%	61.5%
RETROFIT	28.9	9.5	14.3	33.3	36.4	20.0	50.0	38.9	28.6	-	22.7	53.3	33.3
ADDED INSULATION ABOVE THE CEILING													
NEW	10.0	4.8	-	22.2	18.2	20.0	-	11.1	14.3	7.1	9.1	13.3	10.3
RETROFIT	14.4	9.5	42.9	11.1	-	60.0	16.7	5.6	14.3	7.1	18.2	13.3	15.4
ADDED INSULATION INTO THE WALLS													
NEW	37.8	9.5	14.3	44.4	45.5	60.0	75.0	38.9	42.9	14.3	13.6	60.0	51.3
RETROFIT	17.8	-	28.6	11.1	-	40.0	33.3	27.8	28.6	-	13.6	6.7	30.8
ADDED INSULATION OVER THE BASEMENT													
NEW	5.6	-	-	11.1	-	40.0	-	11.1	-	-	-	13.3	7.7
RETROFIT	3.3	-	-	-	-	20.0	-	5.6	14.3	-	-	-	7.7
ADDED INSULATION UNDER FREEZER BOXES													
NEW	31.1	9.5	14.3	33.3	36.4	40.0	58.3	44.4	14.3	14.3	22.7	40.0	38.5
RETROFIT	17.8	4.8	-	22.2	9.1	40.0	33.3	27.8	14.3	-	9.1	33.3	23.1
OTHER	1.1	-	-	-	-	-	-	-	14.3	-	-	-	2.6

NOTE: MULTIPLE RESPONSES ALLOWED

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 66

PERCENTAGE OF COMPANIES INSTALLING ENERGY CONTROLLERS AS STANDARD EQUIPMENT IN NEW STORES

		1990 SALES (IN MILLIONS OF DOLLARS)								NUMBER OF STORES			
	ALL COMPANIES	UNDER $10	$10-$30	$31-$100	$101-$250	$251-$500	$501-$999	$1-3 BIL	OVER $3 BIL	1	2-10	11-49	50 +
TOTAL COMPANIES	90	21	7	9	11	5	12	18	7	14	22	15	39
DEFROST TIMER	70.0%	66.7%	85.7%	88.9%	63.6%	40.0%	91.7%	66.7%	42.9%	57.1%	86.4%	66.7%	66.7%
HVAC CONTROL	70.0	42.9	85.7	66.7	63.6	80.0	91.7	88.9	57.1	50.0	59.1	66.7	84.6
REFRIGERATION ALARM SYSTEM	66.7	23.8	57.1	88.9	81.8	60.0	83.3	94.4	57.1	35.7	54.5	73.3	82.1
PRESSURE CONTROL (MAY INCLUDE TEMPERATURE)	58.9	42.9	57.1	55.6	45.5	40.0	75.0	83.3	57.1	42.9	40.9	60.0	74.4
CONDENSER TEMPERATURE/ PRESSURE CONTROLLER	51.1	19.0	57.1	55.6	36.4	60.0	75.0	72.2	57.1	28.6	27.3	46.7	74.4
REFRIGERATION TEMPERATURE CONTROL (EXCLUDING PRESSURE)	45.6	33.3	42.9	66.7	18.2	60.0	66.7	55.6	28.6	35.7	31.8	46.7	56.4
LIGHTING CONTROL (TIME CONTROL)	38.9	14.3	28.6	33.3	36.4	-	41.7	77.8	57.1	21.4	18.2	33.3	59.0
LARGE INTEGRATED CONTROLLER (COMBINES FOUR OR MORE OF THE ABOVE FUNCTIONS)	35.6	9.5	-	22.2	36.4	40.0	75.0	55.6	42.9	14.3	9.1	40.0	56.4
MEDIUM INTEGRATED CONTROLLER (COMBINES TWO OR THREE OF THE ABOVE FUNCTIONS)	27.8	-	28.6	33.3	18.2	20.0	50.0	50.0	28.6	-	18.2	26.7	43.6
DEMAND LIMITER OR LOAD CYCLER	16.7	23.8	14.3	33.3	9.1	-	8.3	16.7	14.3	35.7	22.7	-	12.8
OTHER	5.6	4.8	-	-	-	20.0	16.7	5.6	-	7.1	-	6.7	7.7

NOTE: MULTIPLE RESPONSES ALLOWED

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 67

MEDIAN NUMBER OF MONTHS PER PAYBACK PERIOD FOR ELECTRONIC ENERGY CONTROLLER SYSTEMS

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
TOTAL STORES	24	18	36	3211
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10	36	12	60	11
10 - 30	16	16	48	9
31 - 100	18	18	24	25
101 - 250	30	30	36	55
251 - 500	30	24	30	147
501 - 999	24	18	36	548
1 - 3 BILLION	24	18	36	1844
OVER 3 BILLION	24	24	30	572
NUMBER OF STORES				
1	18	12	36	7
2 - 10	36	24	36	40
11 - 49	30	30	42	138
50 +	24	18	36	3026

NOTE: WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 68

MEDIAN AMOUNT SAVED ANNUALLY PER STORE DUE TO USE OF ENERGY CONTROLLER SYSTEMS

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
TOTAL STORES	$11511	$8600	$17000	2250
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10	6000	4000	18000	5
10 - 30	1500	1500	2500	9
31 - 100	12000	12000	38000	20
101 - 250	22750	6000	24000	30
251 - 500	4300	4300	4300	59
501 - 999	24000	5600	25000	209
1 - 3 BILLION	11511	8600	12000	1771
OVER 3 BILLION	17000	17000	17000	147
NUMBER OF STORES				
1	12000	4000	24000	6
2 - 10	6000	2500	21500	30
11 - 49	12000	6500	20000	87
50 +	11511	8600	17000	2127

NOTE: WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 69

MEDIAN ANNUAL AMOUNT SPENT PER STORE TO MAINTAIN ELECTRONIC ENERGY CONTROLLER SYSTEMS

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
TOTAL STORES	$500	$300	$1450	3008
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10	1200	100	3000	6
10 - 30	500	250	500	5
31 - 100	1000	0	1000	19
101 - 250	3245	1290	5200	40
251 - 500	860	860	860	75
501 - 999	1200	500	1200	268
1 - 3 BILLION	1450	1000	1720	1460
OVER 3 BILLION	300	300	300	1135
NUMBER OF STORES				
1	1800	100	3000	7
2 - 10	500	0	860	17
11 - 49	1200	1200	1290	121
50 +	500	300	1450	2863

NOTE: WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 70
MEDIAN ANNUAL SAVINGS PER STORE OF LOST PRODUCT DUE TO EARLY DETECTION BY ELECTRONIC ENERGY CONTROLLER SYSTEMS

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
TOTAL STORES	$1290	$1000	$3200	964
COMPANY RETAIL SALES (IN MILLIONS OF DOLLARS)				
UNDER 10				3
10 - 30				2
31 - 100	1000	1000	13000	24
101 - 250	4500	4500	4500	33
251 - 500				0
501 - 999	1000	1000	1000	59
1 - 3 BILLION	1290	1000	3000	843
OVER 3 BILLION				0
NUMBER OF STORES				
1				3
2 - 10	10000	0	25000	21
11 - 49	3200	3200	4500	70
50 +	1290	1000	3000	870

NOTE: WEIGHTED BY NUMBER OF STORES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 71
METHODS USED BY COMPANIES TO EVALUATE SAVINGS FROM USE OF ELECTRONIC ENERGY CONTROLLERS

		1990 SALES (IN MILLIONS OF DOLLARS)								NUMBER OF STORES			
	ALL COMPANIES	UNDER $10	$10-$30	$31-$100	$101-$250	$251-$500	$501-$999	$1-3 BIL	OVER $3 BIL	1	2-10	11-49	50 +
TOTAL COMPANIES	37	6	2	3	3	2	7	12	2	7	5	5	20
COMPARE WITH OTHER STORES	54.1%						71.4%	66.7%		-	60.0%	60.0%	70.0%
PROJECT FIGURES	67.6	83.3					57.1	75.0		85.7	40.0	60.0	70.0
ON-OFF TESTING	21.6	16.7					57.1	16.7		28.6	-	20.0	25.0

NOTE: MULTIPLE RESPONSES ALLOWED

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 72

PERCENTAGE OF STORES USING VARIOUS TYPES OF MAIN LIGHTING SYSTEMS

		1990 SALES (IN MILLIONS OF DOLLARS)								NUMBER OF STORES			
	ALL STORES	UNDER $10	$10-$30	$31-$100	$101-$250	$251-$500	$501-$999	$1-3 BIL	OVER $3 BIL	1	2-10	11-49	50 +
TOTAL STORES	5900	43	127	61	217	239	755	1866	2592	13	82	323	5482
FLUORESCENT	82.8%	90.7%	97.6%	86.9%	86.6%	90.0%	91.3%	67.8%	89.2%	100.0%	70.7%	76.5%	83.3%
HIGH INTENSITY DISCHARGE	17.5	4.7	7.9	11.5	19.4	14.2	18.0	32.2	7.8	7.7	24.4	29.1	16.7
OTHER	.1	4.7	-	1.6	.5	-	-	-	-	7.7	1.2	.6	-

TABLE 73

PERCENTAGE OF STORES USING VARIOUS TYPES OF LIGHTING CONTROLS

		1990 SALES (IN MILLIONS OF DOLLARS)								NUMBER OF STORES			
	ALL STORES	UNDER $10	$10-$30	$31-$100	$101-$250	$251-$500	$501-$999	$1-3 BIL	OVER $3 BIL	1	2-10	11-49	50 +
TOTAL STORES	5803	38	123	52	204	239	689	1866	2592	10	67	310	5416
ELECTRONIC TIME CONTROL	38.6%	10.5%	82.9%	7.7%	8.8%	3.3%	34.4%	36.4%	45.8%	10.0%	16.4%	8.4%	40.6%
MECHANICAL/ ELECTRICAL TIME CLOCKS	40.9	34.2	17.9	61.5	51.0	40.2	30.2	39.5	44.9	90.0	47.8	40.6	40.8
OTHER	2.6	2.6	-	28.8	12.3	33.1	3.9	.2	-	-	1.5	12.9	2.0

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 74
STEPS TAKEN BY COMPANIES TO CONTROL LIGHTING COSTS

		1990 SALES (IN MILLIONS OF DOLLARS)								NUMBER OF STORES			
	ALL COMPANIES	UNDER $10	$10-$30	$31-$100	$101-$250	$251-$500	$501-$999	$1-3 BIL	OVER $3 BIL	1	2-10	11-49	50 +
TOTAL COMPANIES	90	21	7	9	11	5	12	18	7	14	22	15	39
SWITCHED TO LOW ENERGY BULBS													
NEW	47.8%	14.3%	28.6%	66.7%	54.5%	80.0%	58.3%	72.2%	28.6%	14.3%	36.4%	80.0%	53.8%
RETROFIT	55.6	28.6	57.1	66.7	72.7	40.0	58.3	72.2	57.1	35.7	50.0	73.3	59.0
REMOVED UNNECESSARY LAMPS													
NEW	15.6	9.5	14.3	11.1	9.1	40.0	16.7	22.2	14.3	21.4	4.5	33.3	12.8
RETROFIT	33.3	9.5	42.9	22.2	18.2	40.0	33.3	55.6	71.4	14.3	22.7	33.3	46.2
SPECULAR SILVER REFLECTORS													
NEW	10.0	9.5	14.3	-	-	-	33.3	11.1	-	7.1	9.1	-	15.4
RETROFIT	21.1	4.8	-	33.3	9.1	-	50.0	33.3	28.6	7.1	9.1	20.0	33.3
ELECTRONIC BALLASTS													
NEW	20.0	4.8	14.3	33.3	18.2	-	8.3	38.9	42.9	14.3	18.2	6.7	28.2
RETROFIT	20.0	9.5	14.3	33.3	9.1	-	25.0	22.2	57.1	7.1	18.2	20.0	25.6
LOWERED LIGHT LEVELS													
NEW	12.2	-	28.6	33.3	-	20.0	8.3	16.7	14.3	7.1	13.6	6.7	15.4
RETROFIT	10.0	-	14.3	11.1	9.1	20.0	-	22.2	14.3	-	4.5	13.3	15.4
BALLAST ENHANCEMENT DEVICES													
NEW	2.2	-	-	-	-	20.0	8.3	-	-	-	-	6.7	2.6
RETROFIT	11.1	14.3	-	22.2	-	-	-	27.8	-	7.1	18.2	-	12.8
OTHER	12.2	-	14.3	22.2	9.1	20.0	8.3	27.8	-	-	9.1	13.3	17.9

NOTE: MULTIPLE RESPONSES ALLOWED

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 75
PERCENTAGE OF STORES USING VARIOUS TYPES OF REFRIGERATION SYSTEMS

		1990 SALES (IN MILLIONS OF DOLLARS)								NUMBER OF STORES			
	ALL STORES	UNDER $10	$10-$30	$31-$100	$101-$250	$251-$500	$501-$999	$1-3 BIL	OVER $3 BIL	1	2-10	11-49	50 +
TOTAL STORES	5655	43	132	61	217	239	755	1616	2592	13	87	323	5232
SINGLE CONVENTIONAL UNITS	51.1%	69.8%	27.3%	39.3%	57.6%	70.7%	47.4%	35.5%	60.8%	61.5%	36.8%	48.0%	51.5%
EVEN PARALLELS	25.6	23.3	35.6	24.6	8.8	13.4	24.1	36.1	21.6	38.5	20.7	19.8	26.0
UNEVEN PARALLELS	26.5	11.6	40.9	27.9	33.2	25.1	24.2	27.7	25.3	7.7	39.1	31.6	26.0
OTHER	1.0	-	-	1.6	-	-	6.5	.6	-	-	-	.9	1.1

TABLE 76
PERCENTAGE OF STORES USING VARIOUS TYPES OF CONDENSING SYSTEMS

		1990 SALES (IN MILLIONS OF DOLLARS)								NUMBER OF STORES			
	ALL STORES	UNDER $10	$10-$30	$31-$100	$101-$250	$251-$500	$501-$999	$1-3 BIL	OVER $3 BIL	1	2-10	11-49	50 +
TOTAL STORES	5627	43	132	61	189	239	755	1616	2592	13	87	295	5232
AIR COOLED	74.8%	93.0%	99.2%	98.4%	95.2%	98.7%	63.6%	74.1%	72.6%	100.0%	93.1%	95.9%	73.2%
WATER COOLED	18.7	7.0	.8	1.6	4.8	2.1	28.1	6.9	27.3	7.7	4.6	4.4	19.7

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 77

PERCENTAGE OF COMPANIES INSTALLING REFRIGERATION SYSTEMS AS STANDARD EQUIPMENT IN NEW STORES

		1990 SALES (IN MILLIONS OF DOLLARS)								NUMBER OF STORES			
	ALL COMPANIES	UNDER $10	$10-$30	$31-$100	$101-$250	$251-$500	$501-$999	$1-3 BIL	OVER $3 BIL	1	2-10	11-49	50 +
TOTAL COMPANIES	90	21	7	9	11	5	12	18	7	14	22	15	39
UNEVEN PARALLELS	58.9%	19.0%	42.9%	66.7%	63.6%	80.0%	83.3%	77.8%	71.4%	14.3%	45.5%	73.3%	76.9%
ELECTRONIC TEMPERATURE	44.4	23.8	71.4	33.3	27.3	60.0	83.3	55.6	14.3	21.4	36.4	46.7	56.4
LARGE ENERGY MANAGEMENT SYSTEM	37.8	14.3	28.6	33.3	45.5	20.0	58.3	55.6	42.9	14.3	31.8	33.3	51.3
THERMOSTAT	33.3	19.0	28.6	44.4	36.4	60.0	16.7	50.0	28.6	21.4	27.3	40.0	38.5
EVEN PARALLELS	28.9	23.8	28.6	11.1	45.5	20.0	25.0	33.3	42.9	14.3	22.7	26.7	38.5
MECHANICAL PRESSURE CONTROL	28.9	19.0	14.3	22.2	45.5	20.0	25.0	38.9	42.9	28.6	18.2	33.3	33.3
SUB-LIQUID COOLING	28.9	9.5	14.3	11.1	9.1	40.0	58.3	61.1	14.3	14.3	13.6	13.3	48.7
WITH UNLOADERS	24.4	4.8	14.3	11.1	-	20.0	33.3	55.6	57.1	14.3	4.5	6.7	46.2
SINGLE CONVENTIONAL UNIT	24.4	19.0	14.3	11.1	27.3	40.0	41.7	22.2	28.6	35.7	4.5	20.0	33.3
SMALL ELECTRONIC	22.2	4.8	-	22.2	18.2	40.0	25.0	44.4	28.6	7.1	9.1	26.7	33.3
PRESSURE CONTROL (MAY INCLUDE TEMPERATURE)													
OPEN DRIVE	5.6	-	-	-	-	-	8.3	16.7	14.3	-	-	-	12.8
OTHER	10.0	4.8	14.3	-	9.1	-	33.3	11.1	-	7.1	4.5	6.7	15.4

NOTE: MULTIPLE RESPONSES ALLOWED

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 78

AVERAGE PERCENTAGE OF ANNUAL COMPANY REFRIGERATION WHICH UTILIZES RECLAIMED AND RECYCLED REFRIGERANT

		1990 SALES (IN MILLIONS OF DOLLARS)								NUMBER OF STORES			
	ALL COMPANIES	UNDER $10	$10-$30	$31-$100	$101-$250	$251-$500	$501-$999	$1-3 BIL	OVER $3 BIL	1	2-10	11-49	50 +
TOTAL COMPANIES	54	6	4	4	8	4	10	12	6	3	9	11	31
AVERAGE PERCENTAGE	3.2%	0	0	5.0%	0	3.8%	.8%	9.3%	3.3%		2.2%	1.4%	4.5%

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 79

AVERAGE PERCENTAGE OF RECLAIMED/RECYCLED REFRIGERANT WHICH IS RECYCLED IN-HOUSE OR BY DISTRIBUTOR/MANUFACTURER

		1990 SALES (IN MILLIONS OF DOLLARS)								NUMBER OF STORES			
	ALL COMPANIES	UNDER $10	$10-$30	$31-$100	$101-$250	$251-$500	$501-$999	$1-3 BIL	OVER $3 BIL	1	2-10	11-49	50 +
TOTAL COMPANIES	36	5	0	5	0	3	6	12	5	2	8	4	22
AVERAGE PERCENTAGE HANDLED BY OWN SERVICE PEOPLE	64.9%	60.0%		78.0%			68.3%	52.9%	80.0%		73.8%	62.5%	63.4%
AVERAGE PERCENTAGE HANDLED BY DISTRIBUTOR AND MANUFACTURER	35.1	40.0		22.0			31.7	47.1	20.0		26.3	37.5	36.6

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 80A
PROFILE OF RESPONDING COMPANIES

	TOTAL COMPANIES	TYPE OF COMPANY: RETAILERS	COOPERATIVE WHOLESALERS	VOLUNTARY WHOLESALERS	UNAFFILIATED WHOLESALERS
TOTAL COMPANIES	72	38	7	21	6

TABLE 80B
PROFILE OF RESPONDING COMPANIES

	ALL COMPANIES	GEOGRAPHIC REGION OF HEADQUARTERS: NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL COMPANIES	72	5	6	13	6	10	8	1	6	17

TABLE 80C
PROFILE OF RESPONDENTS -- NUMBER OF DRY GROCERY CENTERS OPERATED

	ALL CENTERS	GEOGRAPHIC REGION OF HEADQUARTERS: NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL CENTERS	233	9	8	36	23	25	40	6	18	68
RETAILER CENTERS	35.2%	88.9%	62.5%	22.2%	26.1%	88.0%	17.5%	100.0%	88.9%	5.9%
COOPERATIVE WHOLESALER CENTERS	7.3	-	-	-	8.7	4.0	-	-	5.6	19.1
VOLUNTARY WHOLESALER CENTERS	47.6	11.1	37.5	75.0	65.2	4.0	80.0	-	5.6	45.6
UNAFFILIATED WHOLESALER CENTERS	9.9	-	-	2.8	-	4.0	2.5	-	-	29.4

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 81A
ISSUES IN DISTRIBUTION - AVERAGE RANKINGS

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL COMPANIES	NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL COMPANIES	58	4	5	9	5	9	8	1	4	13
WORKER'S COMPENSATION COSTS	5.6	6.5	5.6	5.8	6.6	4.3	6.6		5.8	5.1
RECRUITING AND RETAINING COMPETENT EMPLOYEES	5.0	4.0	6.2	5.6	3.8	6.1	3.9		4.8	4.8
EXCESSIVE INJURIES IN THE CENTER	4.3	4.3	4.3	3.8	4.8	4.3	4.6		5.0	4.0
GOVERNMENT REGULATIONS	3.9	4.3	2.5	3.9	3.8	4.2	3.1		3.3	4.7
LABOR PROBLEMS	3.7	1.8	4.5	4.0	4.2	3.0	3.4		3.5	4.6
SUBSTANCE ABUSE	3.2	4.5	3.6	2.1	2.8	3.9	3.4		3.5	2.7
AGING OF THE WORKFORCE	2.4	2.8	2.4	2.9	2.0	2.1	3.0		2.3	2.3

TABLE 81B
ISSUES IN DISTRIBUTION - AVERAGE RANKINGS

	ALL COMPANIES	RETAILERS	WHOLESALERS
TOTAL COMPANIES	58	31	27
WORKER'S COMPENSATION COSTS	5.6	5.6	5.7
RECRUITING AND RETAINING COMPETENT EMPLOYEES	5.0	4.6	5.4
EXCESSIVE INJURIES IN THE CENTER	4.3	4.7	3.9
GOVERNMENT REGULATIONS	3.9	3.9	3.8
LABOR PROBLEMS	3.7	3.5	4.0
SUBSTANCE ABUSE	3.2	3.3	3.0
AGING OF THE WORKFORCE	2.4	2.5	2.3

NOTE: RANKED FROM 7 - MOST SERIOUS ISSUE TO 1 - LEAST SERIOUS ISSUE

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 82A
PERCENTAGE OF COMPANIES USING THIRD PARTY CARRIERS AND/OR THIRD PARTY WAREHOUSES

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL COMPANIES	NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL COMPANIES	72	5	6	13	6	10	8	1	6	17
PERCENTAGE USING THIRD PARTY CARRIERS	61.1%	80.0%	33.3%	46.2%	66.7%	60.0%	62.5%		83.3%	64.7%
PERCENTAGE USING THIRD PARTY WAREHOUSES	44.4	80.0	66.7	46.2	50.0	30.0	37.5		66.7	23.5

TABLE 82B
PERCENTAGE OF COMPANIES USING THIRD PARTY CARRIERS AND/OR THIRD PARTY WAREHOUSES

	ALL COMPANIES	RETAILERS	WHOLESALERS
TOTAL COMPANIES	72	38	34
PERCENTAGE USING THIRD PARTY CARRIERS	61.1%	60.5%	61.8%
PERCENTAGE USING THIRD PARTY WAREHOUSES	44.4	52.6	35.3

TABLE 83
PERCENTAGE OF CENTERS INVOLVED IN CROSS DOCKING

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL CENTERS	NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL CENTERS	233	9	8	36	23	25	40	6	18	68
PERCENTAGE INVOLVED IN CROSS-DOCKING	54.1%	55.6%	50.0%	38.9%	60.9%	24.0%	90.0%	-	88.9%	45.6%

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 84A
PROFILE OF RESPONDING CENTERS

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL CENTERS	NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL CENTERS	122	9	6	18	12	14	12	4	10	37
RETAIL CENTERS	49.2%	88.9%	66.7%	44.4%	50.0%	78.6%	50.0%	100.0%	90.0%	10.8%
WHOLESALE CENTERS	50.8	11.1	33.3	55.6	50.0	21.4	50.0	-	10.0	89.2

TABLE 84B
PROFILE OF RESPONDING CENTERS

	ALL CENTERS	RETAIL CENTERS	WHOLESALE CENTERS
TOTAL CENTERS	122	60	62
PERCENTAGE:			
EMPLOYEES PRIMARILY UNIONIZED	73.0%	63.3%	82.3%
EMPLOYEES PRIMARILY NON-UNION	27.0	36.7	17.7
PERCENTAGE:			
WITH ENGINEERED LABOR STANDARDS IN PLACE	45.1	46.7	43.5
WITHOUT ENGINEERED LABOR STANDARDS IN PLACE	54.9	53.3	56.5
PERCENTAGE:			
PRIMARILY MARKUP	60.7	50.0	71.0
PRIMARILY NON MARKUP	36.9	46.7	27.4

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 85

MEDIAN OF THE AVERAGE NUMBER OF HARD CASES SELECTED AND SHIPPED PER WEEK

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL CENTERS	250000	104737	420000	117
BY CENTER DOLLAR VOLUME AT COST				
UNDER $50 MILLION	27665	23000	40000	10
$50 - $99 MILLION	62090	50000	87775	15
$100 - $149 MILLION	121523	100000	153752	14
$150 - $249 MILLION	199586	152500	254255	16
$250 MILLION AND OVER	434286	338325	607750	50
BY NUMBER OF SUPERMARKETS SERVED BY THE CENTER				
LESS THAN 50 SUPERMARKETS	77500	30000	119148	39
50 - 99 SUPERMARKETS	291500	199586	350901	40
100 - 149 SUPERMARKETS	460000	216326	607750	19
150 OR MORE SUPERMARKETS	507500	350000	750000	18
BY AVERAGE SIZE OF SUPERMARKETS SERVED BY THE CENTER				
UNDER 20,000 TOTAL SQUARE FEET	102368	47915	216913	36
20,000 - 34,999 SQUARE FEET	327560	200000	500000	37
35,000 OR MORE SQUARE FEET	350765	158564	540200	30
BY NUMBER OF DAYS CENTER IS OPEN PER WEEK				
5 DAYS	125000	26000	235000	15
6 DAYS	269500	113400	395000	62
7 DAYS	304555	121642	494613	40
BY NUMBER OF SHIFTS OPERATED PER WEEK				
7 OR FEWER SHIFTS	216326	80000	450000	61
8 - 14 SHIFTS	267650	115000	338325	27
15 OR MORE SHIFTS	335000	153752	535000	29
BY MARKUP VS. NON MARKUP				
CENTER PRIMARILY MARKUP	194172	87775	371000	71
CENTER PRIMARILY NON MARKUP	283000	150000	450000	43
BY TOTAL TONNAGE THROUGHPUT (IN POUNDS)				
UNDER 2,000 lbs	355530	194172	560000	27
2,000 TO 2,999 lbs	274250	170450	343136	16
3,000 lbs OR MORE	237000	104737	306000	18

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 86

MEDIAN OF THE AVERAGE NUMBER OF PALLETS REPLENISHED (LET DOWNS) PER LABOR HOUR

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL CENTERS	18	14	21	74
BY CENTER DOLLAR VOLUME AT COST				
UNDER $50 MILLION	24	19	26	4
$50 - $99 MILLION	19	11	30	7
$100 - $149 MILLION	14	12	17	6
$150 - $249 MILLION	19	14	20	12
$250 MILLION AND OVER	14	14	18	36
BY NUMBER OF SUPERMARKETS SERVED BY THE CENTER				
LESS THAN 50 SUPERMARKETS	20	16	29	16
50 - 99 SUPERMARKETS	18	14	22	31
100 - 149 SUPERMARKETS	14	13	15	13
150 OR MORE SUPERMARKETS	18	14	21	13
BY AVERAGE SIZE OF SUPERMARKETS SERVED BY THE CENTER				
UNDER 20,000 TOTAL SQUARE FEET	17	13	28	15
20,000 - 34,999 SQUARE FEET	18	14	21	25
35,000 OR MORE SQUARE FEET	18	14	19	23
BY NUMBER OF DAYS CENTER IS OPEN PER WEEK				
5 DAYS	20	15	22	6
6 DAYS	18	14	23	42
7 DAYS	16	13	20	26
BY NUMBER OF SHIFTS OPERATED PER WEEK				
7 OR FEWER SHIFTS	16	14	21	35
8 - 14 SHIFTS	20	14	24	19
15 OR MORE SHIFTS	18	13	19	20
BY MARKUP VS. NON MARKUP				
CENTER PRIMARILY MARKUP	16	13	21	43
CENTER PRIMARILY NON MARKUP	18	14	22	30
BY TOTAL TONNAGE THROUGHPUT (IN POUNDS)				
UNDER 2,000 lbs	15	13	19	24
2,000 TO 2,999 lbs	14	12	21	9
3,000 lbs OR MORE	21	18	31	15

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 87

MEDIAN OF THE AVERAGE NUMBER OF ORDERS PROCESSED PER WEEK

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL CENTERS	380	239	800	111
BY CENTER DOLLAR VOLUME AT COST				
UNDER $50 MILLION	192	80	296	10
$50 - $99 MILLION	225	120	416	14
$100 - $149 MILLION	246	134	720	11
$150 - $249 MILLION	390	252	588	14
$250 MILLION AND OVER	682	350	1450	51
BY NUMBER OF SUPERMARKETS SERVED BY THE CENTER				
LESS THAN 50 SUPERMARKETS	225	120	349	34
50 - 99 SUPERMARKETS	340	251	663	40
100 - 149 SUPERMARKETS	586	385	1479	19
150 OR MORE SUPERMARKETS	1000	727	1500	17
BY AVERAGE SIZE OF SUPERMARKETS SERVED BY THE CENTER				
UNDER 20,000 TOTAL SQUARE FEET	440	220	800	29
20,000 - 34,999 SQUARE FEET	525	280	1363	39
35,000 OR MORE SQUARE FEET	383	250	750	30
BY NUMBER OF DAYS CENTER IS OPEN PER WEEK				
5 DAYS	176	110	349	15
6 DAYS	416	239	850	57
7 DAYS	500	250	1000	39
BY NUMBER OF SHIFTS OPERATED PER WEEK				
7 OR FEWER SHIFTS	340	190	646	55
8 - 14 SHIFTS	330	239	540	27
15 OR MORE SHIFTS	750	330	1110	29
BY MARKUP VS. NON MARKUP				
CENTER PRIMARILY MARKUP	416	235	750	65
CENTER PRIMARILY NON MARKUP	344	244	800	44
BY TOTAL TONNAGE THROUGHPUT (IN POUNDS)				
UNDER 2,000 lbs	533	290	1349	28
2,000 TO 2,999 lbs	704	340	1197	16
3,000 lbs OR MORE	281	200	416	18

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 88

MEDIAN OF THE AVERAGE NUMBER OF INVENTORY TURNS (ANNUAL)

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL CENTERS	15	12	18	115
BY CENTER DOLLAR VOLUME AT COST				
UNDER $50 MILLION	12	11	12	11
$50 - $99 MILLION	11	10	13	15
$100 - $149 MILLION	16	12	22	14
$150 - $249 MILLION	16	13	19	16
$250 MILLION AND OVER	16	14	20	52
BY NUMBER OF SUPERMARKETS SERVED BY THE CENTER				
LESS THAN 50 SUPERMARKETS	12	11	15	39
50 - 99 SUPERMARKETS	16	13	19	37
100 - 149 SUPERMARKETS	16	13	21	20
150 OR MORE SUPERMARKETS	17	15	20	18
BY AVERAGE SIZE OF SUPERMARKETS SERVED BY THE CENTER				
UNDER 20,000 TOTAL SQUARE FEET	12	11	15	37
20,000 - 34,999 SQUARE FEET	16	13	20	19
35,000 OR MORE SQUARE FEET	16	12	20	29
BY NUMBER OF DAYS CENTER IS OPEN PER WEEK				
5 DAYS	12	11	18	15
6 DAYS	16	13	18	60
7 DAYS	13	12	17	40
BY NUMBER OF SHIFTS OPERATED PER WEEK				
7 OR FEWER SHIFTS	15	12	19	62
8 - 14 SHIFTS	14	11	17	25
15 OR MORE SHIFTS	16	13	18	28
BY MARKUP VS. NON MARKUP				
CENTER PRIMARILY MARKUP	14	12	17	71
CENTER PRIMARILY NON MARKUP	17	12	19	41
BY TOTAL TONNAGE THROUGHPUT (IN POUNDS)				
UNDER 2,000 lbs	16	12	20	28
2,000 TO 2,999 lbs	13	11	17	16
3,000 lbs OR MORE	15	12	19	14

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 89

MEDIAN OF THE TOTAL TONNAGE THROUGHPUT (IN POUNDS)

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL CENTERS	2074	1570	3000	63
BY CENTER DOLLAR VOLUME AT COST				
UNDER $50 MILLION				0
$50 - $99 MILLION	2700	1989	3109	8
$100 - $149 MILLION	1628	1504	2820	5
$150 - $249 MILLION	2900	2056	3448	10
$250 MILLION AND OVER	1860	1450	2230	31
BY NUMBER OF SUPERMARKETS SERVED BY THE CENTER				
LESS THAN 50 SUPERMARKETS	2660	1989	3109	16
50 - 99 SUPERMARKETS	2056	1504	3080	27
100 - 149 SUPERMARKETS	1830	1541	2066	12
150 OR MORE SUPERMARKETS	2460	1450	3340	7
BY AVERAGE SIZE OF SUPERMARKETS SERVED BY THE CENTER				
UNDER 20,000 TOTAL SQUARE FEET	2550	2080	3140	10
20,000 - 34,999 SQUARE FEET	2056	1504	2820	27
35,000 OR MORE SQUARE FEET	1692	1429	2550	16
BY NUMBER OF DAYS CENTER IS OPEN PER WEEK				
5 DAYS	2820	1400	3080	5
6 DAYS	2091	1780	3078	34
7 DAYS	1826	1444	2650	24
BY NUMBER OF SHIFTS OPERATED PER WEEK				
7 OR FEWER SHIFTS	2054	1760	3000	30
8 - 14 SHIFTS	2147	1371	3530	16
15 OR MORE SHIFTS	2082	1570	3000	17
BY MARKUP VS. NON MARKUP				
CENTER PRIMARILY MARKUP	2074	1760	2800	35
CENTER PRIMARILY NON MARKUP	2051	1408	3279	27
BY TOTAL TONNAGE THROUGHPUT (IN POUNDS)				
UNDER 2,000 lbs	1514	1389	1770	28
2,000 TO 2,999 lbs	2230	2080	2500	17
3,000 lbs OR MORE	3370	3078	3780	18

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 90
MEDIAN OF THE AVERAGE NUMBER OF SKUs IN THE CENTER

	MEDIAN	MIDDLE RANGE		NUMBER PARTICIPATING
ALL CENTERS	7168	5500	9800	100
BY CENTER DOLLAR VOLUME AT COST				
UNDER $50 MILLION	6383	4600	7069	8
$50 - $99 MILLION	6900	5500	9000	10
$100 - $149 MILLION	8300	5500	9000	9
$150 - $249 MILLION	6505	5500	9800	14
$250 MILLION AND OVER	8500	6495	12300	49
BY NUMBER OF SUPERMARKETS SERVED BY THE CENTER				
LESS THAN 50 SUPERMARKETS	6439	5000	9000	27
50 - 99 SUPERMARKETS	6500	5300	9500	37
100 - 149 SUPERMARKETS	7586	6700	12000	18
150 OR MORE SUPERMARKETS	9000	8342	11500	17
BY AVERAGE SIZE OF SUPERMARKETS SERVED BY THE CENTER				
UNDER 20,000 TOTAL SQUARE FEET	8300	6400	9800	29
20,000 - 34,999 SQUARE FEET	7150	6050	10678	36
35,000 OR MORE SQUARE FEET	6500	5060	10000	27
BY NUMBER OF DAYS CENTER IS OPEN PER WEEK				
5 DAYS	7700	5463	10876	11
6 DAYS	7018	5900	9100	54
7 DAYS	7472	5500	10481	35
BY NUMBER OF SHIFTS OPERATED PER WEEK				
7 OR FEWER SHIFTS	6840	6282	9784	52
8 - 14 SHIFTS	6905	5332	10440	24
15 OR MORE SHIFTS	8450	5141	9800	24
BY MARKUP VS. NON MARKUP				
CENTER PRIMARILY MARKUP	7036	6100	9500	57
CENTER PRIMARILY NON MARKUP	7381	5365	11193	42
BY TOTAL TONNAGE THROUGHPUT (IN POUNDS)				
UNDER 2,000 lbs	10250	5848	14300	24
2,000 TO 2,999 lbs	9000	6100	12000	15
3,000 lbs OR MORE	6500	5500	9000	18

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 91

PERCENTAGE OF ANNUAL SALES VOLUME ATTRIBUTED TO – SUMMARY OF MEANS

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL COMPANIES	NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL RESPONDENTS	34	1	3	6	2	3	3	0	2	14
INDEPENDENT FOOD STORES	58.7%			43.0%						50.8%
SUPERMARKET CHAINS (11+ STORES)	18.8			19.5						13.5
COMPANY OWNED STORES	16.6			21.8						27.7
CONVENIENCE STORES	4.5			14.8						5.9
FOOD SERVICE/ INSTITUTIONAL SERVICE	1.3			.9						2.0

NOTE: DATA WEIGHTED BY 1990 SALES

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 92
SERVICES PROVIDED TO MEMBERSHIP

		GEOGRAPHIC REGION OF HEADQUARTERS								
	ALL COMPANIES	NEW ENGLAND	MIDDLE ATLANTIC	EAST NORTH CENTRAL	WEST NORTH CENTRAL	SOUTH EAST	WEST SOUTH CENTRAL	MOUNTAIN	PACIFIC	CANADA
TOTAL RESPONDENTS	37	1	3	7	2	3	3	0	2	16
ELECTRONIC ORDERING	94.6%			100.0%						87.5%
INDIVIDUAL RETAIL PRICING	91.9			100.0						81.3
STORE PLANNING & ENGINEERING	91.9			100.0						87.5
INTERIOR DESIGN & DECOR SUPPORT	91.9			100.0						93.8
RETAIL ACCOUNTING	86.5			100.0						87.5
PRODUCT MOVEMENT DATA	86.5			85.7						75.0
GROSS MARGIN REPORT BY ITEM	86.5			85.7						81.3
SCANNING SUPPORT	86.5			100.0						75.0
EDUCATIONAL TRAINING PROGRAMS	86.5			100.0						75.0
EQUIPMENT & FIXTURE FINANCING	86.5			100.0						87.5
EQUIPMENT FINANCING	81.1			100.0						81.3
MEMBER PAYROLL	78.4			100.0						62.5
INSURANCE	75.7			85.7						62.5
HANDLE PRIVATE LABEL	73.0			71.4						75.0
REAL ESTATE/SITE DEVELOPMENT	73.0			100.0						56.3
DSD SYSTEM	70.3			71.4						62.5
LEASE FINANCING	70.3			100.0						56.3
SPACE MANAGEMENT	59.5			57.1						62.5
HANDLE GENERIC LABEL	59.5			42.9						50.0
INDUSTRIAL RELATIONS SUPPORT	51.4			57.1						62.5
LABOR CONTROL SUPPORT	51.4			57.1						56.3
ELECTRONIC FUNDS TRANSFER E.G ATMs, DIRECT DEBIT CARDS, ETC.	45.9			42.9						43.8
CREDIT UNION	43.2			57.1						37.5

MULTIPLE RESPONSES ALLOWED

NOTE: UNWEIGHTED DATA

SOURCE: FOOD MARKETING INSTITUTE, FOOD MARKETING INDUSTRY SPEAKS, 1991

TABLE 93

OPERATING RESULTS

(Current & Historical)

	1981	1982	1983	1984	1985	1986	1987	1988	1989	1990
Profit										
Gross Profit with Warehouse	23.0%	23.4%	23.7%	24.1%	24.0%	23.6%	23.9%	23.9%	24.0%	24.3%
Gross Profit without Warehouse	20.9	21.2	21.5	21.6	22.3	21.3	22.6	22.2	23.4	22.6
Net Profit (before taxes)	1.4	1.5	1.0	1.6	1.8	1.7	1.6	1.2	1.5	8.9
Expenses										
Store Labor	8.5	8.8	8.8	8.9	8.6	8.8	8.6	8.7	8.8	2.5
Fringe Benefits	2.0	2.1	2.2	2.3	2.3	2.2	2.5	2.3	2.4	

Source: Food Marketing Institute, Operations Review

HISTORICAL FACTS

TABLE 94

CONSUMER PRICE INDEX*

Annual Average

	ALL ITEMS		FOOD AT HOME		FOOD AWAY FROM HOME	
	C.P.I.	Percent Change	C.P.I.	Percent Change	C.P.I.	Percent Change
1990	130.7	5.4%	133.3	6.5%	133.4	4.7%
1989	124.0	4.8	124.2	6.5	121.8	4.6
1988	118.3	4.1	116.6	4.2	121.8	4.1
1987	113.6	3.7	111.9	4.3	117.0	4.0
1986	109.6	1.9	107.3	2.9	112.5	3.9
1985	107.6	3.6	104.3	1.4	108.3	4.0
1984	103.9	4.3	102.8	3.7	104.2	4.2
1983	99.6	3.2	99.1	1.1	100.0	4.4
1982	96.5	6.1	98.1	3.4	95.8	5.3
1981	90.9	10.4	94.8	7.3	90.9	9.0

* 1982-84 = 100

Source: Consumer Price Index
Detailed Report for December
U.S. Department of Labor
Bureau of Labor Statistics

TABLE 95

HISTORICAL DATA

Median Percent Change in Retail Sales	
1990	5.3%
1988 vs. 1989	6.5
1987 vs. 1988	6.9
1986 vs. 1987	5.5
1985 vs. 1986	5.5
1984 vs. 1985	5.0
1983 vs. 1984	7.3
1982 vs. 1983	7.6
1981 vs. 1982	8.7
1980 vs. 1981	9.3

Median Percent Change in Retail Sales-Identical Stores	
1990	3.7%
1988 vs. 1989	5.3
1987 vs. 1988	5.5
1986 vs. 1987	4.0
1985 vs. 1986	4.3
1984 vs. 1985	3.6
1983 vs. 1984	5.6
1982 vs. 1983	6.1
1981 vs. 1982	7.7
1980 vs. 1981	8.1

Median Weekly Store Sales	
1990	$174,800
1989	193,500
1988	210,770
1987	184,210
1986	171,936
1985	164,408
1984	140,016
1983	122,265
1982	143,678
1981	126,564

Median Weekly Sales Per Square Foot	
1990	$9.00
1989	9.45
1988	9.50
1987	8.80
1986	7.88
1985	8.43
1984	8.00
1983	6.95
1982	7.90
1981	6.75

Median Sales Per Transaction	
1990	$17.43
1989	17.60
1988	16.80
1987	16.30
1986	16.04
1985	16.33
1984	15.36
1983	14.60
1982	14.33
1981	14.23

TABLE 96

PROPORTION OF INCOME SPENT FOR FOOD

	At home	Away from home	Total
		Percent	
1960	14.1	3.5	17.6
1965	11.8	3.5	15.3
1970	10.4	3.7	14.1
1975	10.1	4.0	14.1
1980	9.3	4.5	13.8
1985	8.0	4.6	12.6
1987	7.6	4.8	12.4
1988	7.4	4.6	11.9
1989	7.4	4.5	11.9
1990	7.3	4.5	11.8

Source: United States Department of Agriculture

Definitions

COMPANYWIDE AND INDIVIDUAL STORE OPERATIONS

Supermarket	A retail food store with at least $2 million in annual sales
Store Formats:	
Conventional Store	A supermarket under 30,000 square feet in total area.
Superstore	A supermarket with more than 30,000 square feet and offering an expanded selection of nonfoods. Extensive service departments are also offered.
Combination Store	Same as a superstore but the percentage of nonfood space is 25 percent or more of the total.
Warehouse Store	A store using utilitarian fixtures and emphasizing lowered prices at the expense of customer service.
Total Annual Sales	Sales for all supermarkets a company had in operation in a given period.
Identical Stores	Only those supermarkets in operation during the entire two-year period, 1989 and 1990.
Selling Area	Area of the store accessible to customers, including front end. Excludes back room, mezzanine office space and rest rooms.
Sales per Square Foot of Selling Area	Average weekly sales divided by the total selling area of the stores.
Sales per Labor Hour	Actual weekly hours worked by store employees including the manager divided into sales.

WHOLESALE AND DISTRIBUTION CENTER OPERATIONS

Wholesaler	A large-scale buyer, who is usually also a warehouser, who supplies products to other distributors, grocery chains, individual food stores, restaurants, or institutions.
Types of Wholesalers:	
Cooperative	A retailer-owned grocery wholesale organization. Multi-store and single store owners band together to achieve the advantage of chain-like distribution patterns.
Voluntary	A wholesaler-sponsored grocery wholesale operation in which agreements with groups of retailers ensure the wholesaler of commitments to buy. It enables the wholesaler to engage in volume purchasing on their behalf. Multi-store and single-store owners affiliate, often under a common name.
Unaffiliated	A wholesaler serving retailers who have no interest in the company nor are affiliated with voluntary merchandising groups sponsored by the wholesaler.

Distribution Center Volume at Cost	Includes all the cost of dry grocery shipments from the center for one fiscal year. The cost includes the original cost of the merchandise less discounts and allowances and freight-in.
Mark-up vs. non mark-up	Whether the center is treated as a cost center or a profit center.
Cases selected	Includes only hard cases — no repacks.
Tonnage throughput	Tons of merchandise passing through the center per labor hour. Includes labor hours for all workers in the center whether directly involved in selecting or receiving or indirectly involved, e.g., clerical, maintenance, sanitation, etc.

Geographic Regions

New England
Connecticut
Rhode Island
Massachusetts
Vermont
New Hampshire
Maine

Middle Atlantic
New Jersey
Pennsylvania
New York

Southeast
Florida
Tennessee
Mississippi
Kentucky
Alabama
Virginia
Georgia
West Virginia
South Carolina
Maryland
North Carolina
Delaware

West South Central
Louisiana
Arkansas
Texas
Oklahoma

East North Central
Ohio
Indiana
Illinois
Michigan
Wisconsin

West North Central
Missouri
Kansas
Nebraska
Iowa
South Dakota
North Dakota
Minnesota

Mountain
Arizona
Colorado
New Mexico
Idaho
Nevada
Wyoming
Utah
Montana

Pacific
California
Oregon
Washington
Alaska
Hawaii

QUESTIONNAIRES

FOLLOWING ARE SAMPLES
OF THE SURVEY FORMS USED
TO COLLECT DATA FOR
THE 1991 REPORT

FOOD MARKETING INSTITUTE

THE FOOD MARKETING INDUSTRY SPEAKS, 1991
SUPERMARKET OPERATIONS QUESTIONNAIRE

This questionnaire is part of FMI's annual industry study. It is designed to track trends and developments in supermarket operations. We encourage your participation so that the results may be as representative as possible. All data will be held in strictest confidence. Please answer as many questions as possible. If you have any questions, please contact Mike McCarthy in our research department at 202-429-8277.

I. GENERAL OPERATIONS

1. How many supermarkets is your company currently operating (a supermarket is a retail food store with at least $2 million in annual sales)

___,___ ___ ___ supermarkets

2. What were your retail sales in (if 1990 figures are not available, please give an estimate):

a. 1989? . . . . . .___ ___,___ ___ ___.___ million

b. 1990? . . . . . .___ ___,___ ___ ___.___ million

3. What were your sales for "identical stores" (those supermarkets you had in operation throughout the entire two-year period, 1989 and 1990) in:

a. 1989? . . . . . .___ ___,___ ___ ___.___ million

b. 1990? . . . . . .___ ___,___ ___ ___.___ million

4. What percentage of your operation is supplied by the following:

a. own warehouse . . . . ___ ___ ___.___%

b. voluntary wholesaler . . . . ___ ___ ___.___%

c. cooperative wholesaler . . . ___ ___ ___.___%

d. unaffiliated wholesaler . . ___ ___ ___.___%

e. direct vendor deliveries . . ___ ___ ___.___%

TOTAL 1 0 0 . 0 %

5a. What percentage of your total supermarket sales in 1990 is accounted for by NON-FOODS? (include HBC, Tobaccos and other "General Merchandise") . . ___ ___.___%

5b. (Optional) What percentage of your total supermarket sales in 1990 is accounted for by the following non-food areas:

Health and Beauty Care Products . . . ___ ___.___%

Tobacco . . . . ___ ___.___%

Other non-foods . . . . ___ ___.___%

TOTAL (should add to total in Q. 5a.) ___ ___.___%

6. Please provide total company data for each of the following items:

a. Average weekly sales per supermarket in 1990 . . . . ___,___ ___ ___,___ ___ ___

b. Average number of checkouts in your stores in 1990 . . . ___ ___

c. Average sale per customer transaction in 1990 . . . . . $___ ___.___ ___

d. Average weekly sales per square foot of selling area (divide average weekly sales for all your supermarkets in operation the entire year by the number of square feet of selling area-customer area in these stores) . . . . $___ ___.___ ___

e. Total size, in square feet, of your typical store . ___ ___ ___,___ ___ ___ sq.ft.

f. Average retail price per item for all items sold in your stores in 1990. $___.___ ___

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6. (continued)

g. On average, how many different items does your typical supermarket carry (count each brand, size, flavor, variety, type of meat cut, etc., as a separate item) ___ ___,___ ___ ___

h. Average sales per labor hour for store employees in 1990 (actual hours worked by store personnel including managers divided into sales) . . . . $___ ___ ___.___ ___

7. Please complete the following chart for each type of store you operate. If you do not operate a particular type of store please put NA. Even though your company's definition of store types may differ from the categories that follow, we ask that you use the formats as defined here. This will keep the store type data consistent for the industry-wide information.

	Supermarkets of 30,000 and under total square feet	Supermarkets over 30,000 sq.ft. PLEASE DO NOT INCLUDE COMBO STORES; SEE NEXT COLUMN	Combination Stores over 30,000 total sq.ft. and at least 25% of the area in non-foods (general merchandise)	Warehouse Stores: use utilitarian fixtures and emphasizes lowered prices at expense of customer service
Number of Each Type of Store	___ ___ ___	___ ___ ___	___ ___ ___	___ ___ ___
Average Weekly Sales per Store	$___ ___ ___,___ ___ ___	$___ ___ ___,___ ___ ___	$___ ___ ___,___ ___ ___	$___ ___ ___,___ ___ ___
Average Number of Checkouts per Store	___ ___	___ ___	___ ___	___ ___
Average Sale per Customer Transaction	$___ ___.___ ___	$___ ___.___ ___	$___ ___.___ ___	$___ ___.___ ___
Sales per Labor Hour*	$___ ___ ___.___ ___	$___ ___ ___.___ ___	$___ ___ ___.___ ___	$___ ___ ___.___ ___
Average Weekly Sales per Sq. Ft. of Selling Area	$___ ___.___ ___	$___ ___.___ ___	$___ ___.___ ___	$___ ___.___ ___
Average Total Size in Sq.Ft.	___ ___ ___,___ ___ ___	___ ___ ___,___ ___ ___	___ ___ ___,___ ___ ___	___ ___ ___,___ ___ ___
Average Retail Price per Item	$___.___ ___	$___.___ ___	$___.___ ___	$___.___ ___
Average Number of Items Carried	___ ___,___ ___ ___	___ ___,___ ___ ___	___ ___,___ ___ ___	___ ___,___ ___ ___

*See definition on Question 6h, above

II. CUSTOMER SERVICES

8. Please indicate the number of your stores which offer the following departments/services:

a. Deli offering carry-out items __,__ __ __

b. Lunch counter/ snack bar __,__ __ __

c. Service meat __,__ __ __

d. Fresh seafood __,__ __ __

e. Scratch and/or bake-off bakery __,__ __ __

f. In-store banks . . . . __,__ __ __

g. Home delivery service . . . __,__ __ __

h. Postage Stamps . . . __,__ __ __

j. Reading Center __,__ __ __

k. Floral/ Plant shop __,__ __ __

l. Salad bar . . . __,__ __ __

m. Photo service . __,__ __ __

n. Cosmetic center . . __,__ __ __

o. Video rental . . __,__ __ __

p. Nutritional shelf tags __,__ __ __

q. Greeting Cards . . __,__ __ __

r. Restaurant . . . __,__ __ __

s. Courtesy booth __,__ __ __

t. Wine . . . . . __,__ __ __

u. Liquor . . . . __,__ __ __

v. Beer . . . . . __,__ __ __

w. Pharmacy . . . __,__ __ __

x. Catering . . . __,__ __ __

y. Unpackaged or bulk foods . . . __,__ __ __

i. Cash dispensing machines (Automatic Teller Machines or ATMs) __,__ __ __

III. PAYMENT METHODS

9. Please indicate below the number of stores currently (1990) accepting credit various payment methods for given items and the number of stores planning to do so by the end of 1991 and by the end of 1992.

	Currently (1990)	Planned by end of 1991	Planned by end of 1992
Number of stores accepting credit cards for groceries	___ ___ ___	___ ___ ___	___ ___ ___
Number of stores accepting credit cards for non-food/ pharmaceutical items	___ ___ ___	___ ___ ___	___ ___ ___
Number of stores accepting direct debit cards at the checkout	___ ___ ___	___ ___ ___	___ ___ ___

IV. ADVERTISING

11. What percentage of your company's annual sales was spent on advertising in 1990? ___.___ ___ percent (SAMPLE ANSWER 1.35%)

Are co-op dollars included in this percentage? /__/ YES /__/ NO

If YES, what percentage of your advertising expenses are co-op? __ __.__ percent

12. What percentage of your advertising budget was spent on:

newspaper ___ ___.___

radio ___ ___.___

television ___ ___.___

targeted mailer/flyer ___ ___.___

in-store coupons ___ ___.___

billboards ___ ___.___

other ___ ___.___
TOTAL 1 0 0 . 0%

FOOD MARKETING INSTITUTE

THE FOOD MARKETING INDUSTRY SPEAKS, 1991 INDIVIDUAL STORE QUESTIONNAIRE

This survey is part of FMI's annual study of the supermarket industry. For the first time, The Food Marketing Industry Speaks, 1991 will report on the operating results of individual stores. This will enable us to provide you with benchmark operating results based on customer transactions, service levels in the store, store format and other variables.

The questions are on the other side of this sheet. Please provide data for three stores of your choice. We encourage you to select a wide variety of stores, i.e, different formats, sizes, service levels, etc., so that we may provide results for many different types of stores. If average data for the year are unavailable, please select data for a "typical" week, that is a week in which sales were not unduely affected by holidays, grand opening specials, etc.

IT IS NOT NECESSARY TO ANSWER EVERY QUESTION. Please answer as many as you can. Instructions for selected questions are below.

INSTRUCTIONS FOR INDIVIDUAL STORE QUESTIONS

4. Selling Area -- the area of the store that is open to customers (excepting rest rooms)

5. Weekly Store Payroll -- includes straight, overtime and regular recurring bonus payments to all store personnel including the manager. DO NOT INCLUDE FRINGE BENEFITS. Also, please exclude labor costs for employees not working at the store level or who service more than one store.

6. Weekly Labor Hours -- include hours for all store personnel, including the manager.

8. Store Formats -- many of today's supermarkets do not fit neatly into one category. Please select the format as defined here that best describes the store. This will keep the store type data consistent for industry-wide information.

   A. Conventional Supermarket -- a supermarket with a total store area of 30,000 square feet or less.

   B. Super Store -- a supermarket with more than 30,000 square feet in total store area and offering an expanded selection of both foods and non-foods. Extensive service departments are also offered.

   C. Combination Store -- similar to a superstore but the percentage of non-foods is at least 25 percent of the total items carried in the store. Also can be thought of as a "food-drug combo."

   D. Warehouse Store -- a supermarket that uses utilitarian fixtures and emphasizes lowered prices at the expense of customer service.

12. Express Checkout -- any checkout so designated as "express", i.e., a checkout at which customers are limited to a certain number of items and sometimes to certain payment methods.

15. Non-express or "regular" checkout -- any checkout not designated as "express" or another, similar name.

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GENERAL OPERATIONS

	STORE NUMBER 1	STORE NUMBER 2	STORE NUMBER 3
1. Estimated total annual sales (1990)	$__ __.__ __ million	$__ __.__ __ million	$__ __.__ __ million
2. Total annual sales (1989)	$__ __.__ __ million	$__ __.__ __ million	$__ __.__ __ million
3. Total size of store in square ft.	__ __ __,__ __ __	__ __ __,__ __ __	__ __ __,__ __ __
4. Total selling area	__ __ __,__ __ __	__ __ __,__ __ __	__ __ __,__ __ __
5. Average weekly payroll	$________	$________	$________
6. Average number of weekly labor hours	________	________	________
7. Average number of weekly customer transactions	________	________	________
8. Please circle which format best describes the store:			
A = Conventional Store B = Super Store C = Combination Store D = Warehouse Store	A B A B	A B A B	A B A B
9. Please circle any of the following services contained in the store:			
A = Service Meat B = Service Seafood C = Pharmacy D = Service Deli E = Prepared Foods F = Service Bakery G = Courtesy Booth I = Lunch Counter/ Snack Bar J = Scratch or Bake/off Bakery K = Carry-out clerks	A B C D E F G H I J K	A B C D E F G H I J K	A B C D E F G H I J K
10. State/province where the store is located	________	________	________

CHECKOUTS

11. Total number of checkouts in the store	__ __	__ __	__ __
12. Number of "express" checkouts in the store	__ __	__ __	__ __
13. Average weekly sales at express checkouts	$__ __,__ __ __	$__ __,__ __ __	$__ __,__ __ __
14. Number of weekly customer transactions at the express checkout	________	________	________
15. Average weekly sales at "regular" (non-express) checkouts	$__ __,__ __ __	$__ __,__ __ __	$__ __,__ __ __
16. Number of weekly customer transactions at "regular" checkouts	________	________	________

FOOD MARKETING INSTITUTE

THE FOOD MARKETING INDUSTRY SPEAKS, 1991
SURVEY OF PREPARED FOODS IN THE SUPERMARKET

This questionnaire is part of FMI's annual industry study. It is designed to track trends and developments in supermarket operations. We encourage your participation so that the results may be as representative as possible. All data will be held in strictest confidence. Please answer as many questions as possible. If you have any questions, please contact Mike McCarthy in our research department at 202-429-8277.

FOR PURPOSES OF THIS SURVEY, PREPARED FOODS ARE VALUE-ADDED PRODUCTS, USUALLY SOLD IN THE DELI AREA OF THE STORE, WHICH WOULD FORM A MAJOR PART OF A MEAL. EXAMPLES ARE READY-TO-EAT PIZZA, MADE-TO-ORDER SANDWICHES, READY-TO-EAT SALADS, ETC. ITEMS SUCH AS FROZEN DINNERS WOULD NOT BE INCLUDED.

GENERAL QUESTIONS

1a. How many supermarkets does your company operate (a supermarket is a retail food store with at least $2 million in annual sales)? ___,___ ___ ___ supermarkets

1b. For demographic purposes, what were your company's approximate annual sales in 1990? $___ ___,___ ___ ___ million

2. Please estimate the number of supermarkets in your company which featured prepared foods in 1990 . . . . ___,___ ___ ___ supermarkets

3. Please estimate the number of supermarkets in your firm that did not sell prepared foods in 1990 but will be adding that feature in the next 12 months . . . . ___,___ ___ ___ supermarkets

4. Does your firm view prepared foods as (please check only one)?

☐ solely a profit center

☐ solely a traffic pull

☐ both a profit center and a traffic pull

MENU DEVELOPMENT AND PRODUCTION

5. If you have prepared foods in multiple stores, Does your company have/use a central kitchen, not in a store, for making prepared foods for sale in your stores? YES ☐ NO ☐

6. If you have prepared foods in multiple stores, does your company use a satellite system whereby one store produces prepared foods for sale in neighboring stores? YES ☐ NO ☐

7. Does your company offer signature* items? *items which are exclusive to one store or chain YES ☐ NO ☐

8. If YES, are some of these items: developed in-house? YES ☐ NO ☐

are some manufactured by outside companies? YES ☐ NO ☐

9. Are the same standardized recipes used for all your units? YES ☐ NO ☐

10. Do any of your units offer hot foods to go? YES ☐ NO ☐

11. If you answered YES to question 10, do you feature hot foods:

made from scratch in-house? YES ☐ NO ☐

manufactured by outside companies? YES ☐ NO ☐

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12. Does your company produce "from scratch" deli items in-house? YES ☐ NO ☐

13. Does your company (please check and if YES check in what location(s))

make your own sausage? NO ☐ YES ☐ in a Central facility ☐ In-store ☐

have your own smoking operations? NO ☐ YES ☐ in a Central facility ☐ In-store ☐

14. How are new menu items generally conceived? (for example: consumer research, chef ideas, upper management ideas, etc.)

____

____

____

15. What procedure is followed to add a new menu item?

____

____

____

16. What procedure is followed to delete a menu item?

____

____

____

17a. Are new menu items costed before they are offered for sale? (that is, are retail prices generally determined based on the cost of ingredients, labor, etc) YES ☐ NO ☐

17b. If YES, who does the costing? ____________________

18. Have customer's nutritional concerns/interests affected your menu planning? YES ☐ NO ☐

19. If you answered YES, please comment on how your menu has been affected:

____

____

____

PREPARED FOODS PERSONNEL AND TRAINING

20. Do you employ or are you planning to employ food service professionals (those with formal education from culinary arts institutions and/or those with advanced skills in the foodservice area) for your operations? YES ☐ NO ☐

21. Do you recruit employees from restaurants or other foodservice backgrounds? . . . . YES ☐ NO ☐

22. Do you employ professional chefs in your operations? YES ☐ NO ☐

23. If so, how many chefs work in your company? ___ ___ ___ chefs

24. In your opinion, is a professional chef necessary to run a successful prepared foods department? . . . YES ☐ NO ☐

25. Please rate the following training methods for prepared foods personnel:
1=Essential; 2=Very Important;3=Important; 4=Not Important

___ Restaurant/hotel training ___ Culinary school training

___ On-the-job training ___ Formal sales/service training

___ Visiting competitors ___ Job or product specific workshops, conferences, classes

26. In your opinion, what background must a deli director or deli manager have in order to successfully run a deli specializing in prepared foods?

____

____

____

____

FOOD SAFETY AND PACKAGING ISSUES

27. Does your firm have a formal date rotation program specifically set up for prepared foods? . . . . YES /__/ NO /__/

28. What types of dating do you use on your prepared foods (check all that apply)?

___ none ___ code dating ___ pack dates ___ shelf dates

___ shelf dates ___ best if sold by ___ best if eaten by

29. Does your company currently provide any consumer literature on food safety connected to prepared foods? YES /__/ NO /__/

30a. Do you use vacuum packaging in-store? YES /__/ NO /__/

30b. Do you use vacuum packaging in a central facility? YES /__/ NO /__/

31. If you answered YES to question 30a or 30b, what products are you selling in vacuum packaging?

____________________ ____________________

____________________ ____________________

____________________ ____________________

THE FUTURE OF PREPARED FOODS

32. Please rate the future growth potential (next five years) of the following services in your supermarkets:

1 = Very strong 2 = Strong 3 = Moderate 4 = Weak

___ Sit-down restaurants ___ Separate registers for deli/prepared foods

___ Self-serve restaurants ___ Fax/Computer ordering at the deli

___ Take-out restaurants ___ Home delivery for prepared foods

___ Drive-through pick-up ___ Ready meals/semi-prepared

___ Catering/party trays

33. Please rate the future growth potential (next five years) of the following items in your supermarkets?

1 = Very strong   2 = Strong   3 = Moderate   4 = Weak

___ Service meat and cheese in the deli

___ Self-service meat and cheese in the deli

___ Combination service/self-service meat and cheese

___ Vacuum-seal deli meat and cheese made in-store

___ Vacuum-seal deli meat and cheese made out-of-house

___ BBQ chicken

___ Grilled chicken

___ Fried chicken in the deli

___ Flame-roasted chicken

___ Pizza

___ Self-service salads

___ Service salads

___ Chinese foods

___ Mexican foods

34. Following is a list of issues facing supermarket retailers in prepared foods. Please rank each as to their seriousness, with 1 being the most serious and 7 being the least serious.

___ Ensuring the safety of prepared food products

___ Competition from other outlets and fast-food restaurants

___ Managing labor costs and achieving higher levels of productivity

___ Ensuring the quality of prepared food products

___ Obtaining and retaining qualified staff

___ Proper understanding of consumers' needs

___ Staying abreast of new developments

MARKETING AND MERCHANDISING

35. Please rate the following statements as to their relative importance in supermarket foodservice departments: 1=Essential; 2=Very Important;3=Important; 4=Not Important

How important:

___ are seasonal promotions to the success of the foodservice department?

___ is it to create and maintain an image of freshness in the foodservice department?

___ is cross merchandising with other departments?

___ is the location of the foodservice department within the store?

___ is it to have the prepared foods department as a part of the deli department?

___ is it to have the prepared foods department as a separate department?

___ is it to located self-service areas adjacent to their service area counterpart?

___ are nutrition and ingredient labeling to the success of the food service department?

___ is packaging to the initial success of a new product?

___ how important a part do food service departments play in creating an overall image for the store?

FOOD MARKETING INSTITUTE

THE FOOD MARKETING INDUSTRY SPEAKS, 1991
QUESTIONNAIRE ON ENERGY MANAGEMENT

This questionnaire is part of FMI's annual industry study. It is designed to track trends and developments in supermarket operations. We encourage your participation so that the results may be as representative as possible. All data will be held in strictest confidence. Please answer as many questions as possible. If you have any questions, please contact Mike McCarthy in our research department at 202-429-8277.

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1. How many supermarkets does your company operate (a supermarket is a retail food store with at least $2 million in annual sales)? ___,___ ___ ___ supermarkets

I. ENERGY STATISTICS

2. What was the average energy bill per store in: 1989? $__ __ __,__ __ __

1990? $__ __ __,__ __ __

3. What was the average KWH/day/100 sq. ft. of selling area? ___ ___ KWH/day/per 100 sq.ft. of selling area

4. What was the average cost per KWH for a store in: 1989? __ __¢

1990? __ __¢

5. What amount was rebated to your company from local utilities for efficiencies gained for installed equipment for new stores, remodels and maintenance upgrade? $__ __ __,__ __ __

II. HVAC

6. How many of your company's stores have the following HVAC equipment?

a. Roof top units . . . . . . ___ ___ ___

b. Humid climate or low dewpoint AC systems . . . ___ ___ ___

c. Dessicant humidifiers . . ___ ___ ___

d. Split systems . . . . ___ ___ ___

e. Heat pipe . . . . ___ ___ ___

f. Other (specify below) ___ ___ ___

____

7. How many of your stores have heat reclaim heating? ___ ___ ___ stores

8. Which of the following has your company undertaken to control HEATING costs (please circle all that apply and whether new or retro)?

		NEW	RETRO
a.	Installed heat reclamation systems tied in with refrigeration compressors	1	2
b.	Reduced store front or other windows	1	2
c.	Lowered temperatures at certain times of day	1	2
d.	Changed heating systems	1	2
e.	Improved efficiency of your boiler or auxiliary heat source	1	2
f.	Reduced infiltration losses	1	2
g.	Other (please specify)______________________________	1	
h.	None of the above	1	

9. Which steps has your firm undertaken to control AIR CONDITIONING costs (please circle all that apply and whether new or retro)?

a.	Shut off cooling systems at certain times of day	1	2
b.	Raised temperatures	1	2
c.	Moderated outside air intake	1	2
d.	Other (please specify)______________________________	1	2

10. Which steps have you undertaken to increase INSULATION (please circle all that apply and whether new or retro)?

	NEW	RETRO
a. Added insulation to the roof	1	2
b. Added insulation above the ceiling	1	2
c. Added insulation into the walls	1	2
d. Added insulation over the basement	1	2
e. Added insulation under freezer boxes	1	2
f. Other (please specify)________________________________	1	

11. How many of your stores have night setback temperature controls? ___ ___ ___ stores

12. How many of your stores have two-speed or variable air handlers? ___ ___ ___ stores

III. ENERGY CONTROLLERS

13. Which electronic energy controllers does your firm install as standard equipment in new stores (please circle all that apply)?

1 Defrost timer

2 HVAC control

3 Lighting control (time control)

4 Demand limiter or load cycler

5 Refrigeration alarm system

6 Pressure control (may include temperature)

7 Refrigeration temperature control (excluding pressure)

8 Condenser temperature/pressure controller

9 Medium integrated controller (combines two or three of the above functions)

10 Large integrated controller (combines four or more of the above functions)

11 Other (please specify below)

____

14. In a typical store, how long was the payback period on the system?

Payback __ __ months

15. Please estimate how much money a typical store saved by use of these systems? . . . . $__ __,__ __ __ per year

16. How much is spent in a typical store to maintain these systems? $__,__ __ __

17. In a typical store, how much is saved in lost product due to early detection by these systems? . . . . $__ __,__ __ __

18. What methods are used to evaluate the savings (please circle all that apply)?

1 Compare with other stores

2 Project figures

3 On/Off testing

IV. LIGHTING

19. How many of your stores have the following main lighting systems:

Flourescant? . . . . ___ ___ ___ High intensity discharge? ___ ___ ___

Other (please specify)________________________________ ___ ___ ___

20. How many of your stores have the following lighting controls:

Electronic time control? ___ ___ ___ Mechanical/electrical time clocks ___ ___ ___

Other (please specify) ________________________________ ___ ___ ___

21. Which of the following steps has your company taken to control lighting (please choose all that apply and circle whether new or retro)?

	NEW	RETRO		NEW	RETRO
Switched to low energy bulbs	1	2	Electronic ballasts	1	2
Removed unecessary lamp	1	2	Lowered light levels	1	2
Specular silver reflectors	1	2	Ballast enhancement devices	1	2

Other (please specify)____ 1

V. REFRIGERATION

22. HOW MANY of your stores use these REFRIGERATION systems:

Single conventional units . . ___ ___ ___

Even parallels . . . . ___ ___ ___

Uneven parallels . . . . ___ ___ ___

Other________________________ ___ ___ ___

23. How many of your stores use these condensing systems?

Air cooled . . . . ___ ___ ___

Water cooled . . . . ___ ___ ___

24. Which systems are installed as standard equipment in new stores (please circle all that apply)?

1 Open drive

2 Even parallels

3 Thermostat

4 With unloaders

5 Uneven parallels

6 Single conventional unit

8 Large energy management system

9 Mechanical pressure control

10 Electronic temperature control

11 Small electronic pressure control (may include temperature)

12 Sub-liquid cooling

13 Other____

25. Please state the type, usage and cost of refrigerant (R-12, 502, 22, etc.) at the following facilities

	TYPE	USE	AVERAGE COST PER POUND
a. Typical new store			
b. Maintenance all stores			
c. Typical store A/C systems			
d. Frozen Distribution Centers			
f. Perishable Distribution Centers			
g. Trucking Refrigeration System			

26. What percentage of your annual refrigeration use has utilized reclaimed and recycled refrigerant? ___ ___.___%

27. Of this percentage, how much is handled by your own service people utilizing recycling equipment and what percentage is handled by distributor and manufacturer?

___ ___ ___% handled by own service people

___ ___ ___% handled by distributor and manufacturer

28. Please explain what areas concern you most relative to your future electrical and energy supplies in your region.

29. What areas concern you the most regarding the issue of CFC refrigerants and what strategies are you using to deal with the problem?

a. areas of concern

b. strategies

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THE FOOD MARKETING INDUSTRY SPEAKS, 1991
WHOLESALE AND DISTRIBUTION CENTER OPERATIONS QUESTIONNAIRE

This questionnaire is part of FMI's annual industry study, designed to provide descriptive and comparative information for the industry. You need not answer all the questions but please complete as much of the questionnaire as you can. If you have any questions, please contact Mike McCarthy in the FMI research department at 202-429-8277.

GENERAL INFORMATION

1. Which of the following best describes your company? (please check only one)

a. Cooperative wholesaler . . /_/ c. Unaffiliated wholesaler . . . /_/

b. Voluntary wholesaler . . . /_/ d. Retailer . . . . /_/

If you are a wholesaler, please remember to answer the questions on the back page of this survey.

2. How many DRY GROCERY distribution centers does your company currently operate?

___ ___ centers

ISSUES IN DISTRIBUTION

3. Please rank from 1 to 6 in order of seriousness the following issues facing your distribution operations with 1 the most serious, 6 the least serious, etc.

____ Recruiting and retaining competent employees

____ Workers compensation costs

____ Excessive injuries in the center

____ Government regulations

____ Labor problems

____ Substance abuse

____ Aging of the workforce

4. Is your firm currently using:

a. Third party carriers? YES /_/ NO /_/

b. Third party warehouses YES /_/ NO /_/

5a. Are any of your distribution centers involved in cross docking? YES /_/ NO /_/

5b. If so, how many? ___ ___ centers

INDIVIDUAL CENTER INFORMATION

FOR THE QUESTIONS ON THE NEXT PAGE, PLEASE PROVIDE DATA FOR EACH DRY GROCERY CENTER THAT YOUR COMPANY OPERATES. INCLUDE DRY GROCERY OPERATIONS ONLY. PLEASE EXCLUDE SATELLITES OR OUTSIDE WAREHOUSES. IF YOU OPERATE MORE THAN FOUR CENTERS, PLEASE SELECT A REPRESENTATIVE SAMPLE OF YOUR OPERATIONS.

INSTRUCTIONS FOR SELECTED QUESTIONS

6. Distribution center volume at cost: volume at cost should include all the cost of dry grocery shipments from the center for one fiscal year. The cost should include the following:

   - Original cost of merchandise less discounts and allowances.

   - Freight-in.

7. Number of supermarkets served by the center: a supermarket is a retail food store with at least $2 million in annual sales.

12. Mark-up vs. Non mark-up: is the center treated primarily as a profit center (mark-up) or a cost (non mark-up) center?

14. Average number of hard cases selected and shipped per week: include only hard cases -- no repacks. Include only merchandise selected in the center. Do not include cross dock or merchandise that simply passes through the center.

18. Average number of hard-case SKUs in the center: include only hard cases -- no repacks.

19. Total tonnage throughput: tons of merchandise passing through the center per labor hour. Include labor hours for all workers in the center whether directly involved in selecting or receiving or indirectly involved, e.g., clerical, maintenance, sanitation, etc.

20. Geographic Region -- please indicate one region per center using the abbreviations from the list below.

NE = New England
Connecticut
Rhode Island
Massachusetts
Vermont
New Hampshire
Maine

MA = Middle Atlantic
New Jersey
New York
Pennsylvania

SE = Southeast
Florida
Mississippi
Alabama
Georgia
South Carolina
North Carolina
Tennessee
Kentucky
Virginia
West Virginia
Maryland
Delaware

WSC = West South Central
Louisiana
Arkansas
Texas
Oklahoma

ENC = East North Central
Ohio
Indiana
Illinois
Michigan
Wisconsin

WNC = West North Central
Missouri
Kansas
Nebraska
Iowa
South Dakota
North Dakota
Minnesota

M = Mountain
Arizona
New Mexico
Nevada
Utah
Colorado
Idaho
Wyoming
Montana

P = Pacific
California
Oregon
Washington
Alaska
Hawaii

	CENTER #1	CENTER #2	CENTER #3	CENTER #4
6. What is the center's annual dollar volume at cost in millions (if 1990 figures are not available, please estimate)?	$__ __ __.__	$__ __ __.__	$__ __ __.__	$__ __ __.__
7. How many supermarkets are served by the center?	__ __ __	__ __ __	__ __ __	__ __ __
8. What is the average size of the supermarkets (in sq.ft.) served by the center?	__ __,__ __ __	__ __,__ __ __	__ __,__ __ __	__ __,__ __ __
9. Are the majority of the center's employees (please check one)	Union /__/ Non-union /__/	Union /__/ Non-union /__/	Union /__/ Non-union /__/	Union /__/ Non-union /__/
10. How many shifts are operated per week?	__ __	__ __	__ __	__ __
11. How many days is the center open per week?	____	____	____	____
12. Is the center primarily (please circle) 1) mark-up 2) non mark-up	1 2	1 2	1 2	1 2
13. Have engineered labor standards been implemented?	Yes /__/ No /__/	Yes /__/ No /__/	Yes /__/ No /__/	Yes /__/ No /__/
14. What was the average number of hard cases selected and shipped per week?	__,__ __ __	__,__ __ __	__,__ __ __	__,__ __ __
15. What was the average number of pallets replenished (let downs per labor hour?	__ __ __	__ __ __	__ __ __	__ __ __
16. What was the average number of orders processed per week?	__,__ __ __	__,__ __ __	__,__ __ __	__,__ __ __
17. What was the average number of inventory turns (annual)?	__ __	__ __	__ __	__ __
18. What was the average number of SKUs in the center?	__ __,__ __ __	__ __,__ __ __	__ __,__ __ __	__ __,__ __ __
19. What was the total tonnage throughput per labor hour?	__,__ __ __	__,__ __ __	__,__ __ __	__,__ __ __
20. In what region is the center located?	________	________	________	________

IF YOU ARE A WHOLESALER, PLEASE TURN THE PAGE AND COMPLETE THE REST OF THE QUESTIONNAIRE. IF YOUR COMPANY DOES NOT HAVE ANY WHOLESALE OPERATIONS, PLEASE FILL IN THE INFORMATION AT THE BOTTOM OF THE NEXT PAGE AND RETURN THE SURVEY TO FMI. THANK YOU FOR YOUR COOPERATION.

WHOLESALE OPERATIONS

21. What were your total company sales in (if 1990 figures are unavailable, please give an estimate):

a. 1989 \$__ __,__ __ __.__ million

b. 1990 \$__ __,__ __ __.__ million

22. What percentage of your total annual shipping volume is attributed to:

a. Company owned stores __ __ __.__%

b. Independent food stores __ __ __.__%

c. Supermarket chains (11+ stores) __ __ __.__%

d. Convenience stores __ __ __.__%

e. Food service/institutional service __ __ __.__%

TOTAL 1 0 0 . 0 %

23. Does your firm provide any of the following services to your wholesaler members (Please check Yes or No after each)?

A. STORE OPERATIONS	YES	NO
1. Retail Accounting	☐	☐
2. Individual retail pricing program	☐	☐
3. Product movement data	☐	☐
4. Gross margin report by item	☐	☐
5. Space management	☐	☐
6. Scanning support	☐	☐
7. DSD system	☐	☐
8. Electronic ordering	☐	☐
9. Member payroll	☐	☐

B. PRODUCTS

1. Handle private label
2. Handle generic label

C. HUMAN RESOURCES	YES	NO
1. Industrial relations support	☐	☐
2. Labor control support	☐	☐
3. Educational training programs	☐	☐
D. STORE PLANNING AND DEVELOPMENT		
1. Real estate/site development	☐	☐
2. Store planning & engineering	☐	☐
3. Interior design & decor support	☐	☐
4. Equipment & fixture financing	☐	☐
5. Lease financing	☐	☐
6. Equipment financing	☐	☐
E. OTHER SERVICES		
1. Electronic funds transfer, e.g. ATM's, direct debit cards, etc.	☐	☐
2. Insurance	☐	☐
3. Credit Union	☐	☐

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